



User Training

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IRIS Training Handout

I. Introduction

Welcome to Standard User Training for the IRIS Immunization Registry Information System.

IRIS, Iowa's Immunization Registry Information System, is a secure, confidential, population-based computerized system that contains immunization information for individuals of all ages residing in the State of Iowa. IRIS is a population-based web application containing consolidated demographic and immunization history information. IRIS performs a variety of functions for health care providers including:

- Recording immunizations, contraindications, and reactions
- Validating immunization history and providing immunization forecasts
- Producing recall and reminder notices, vaccine usage, and patient reports
- Managing vaccine inventory
- Ordering state supplied vaccines


Access to the web application is available at <https://iris.iowa.gov>. By law, only authorized users are allowed to access immunization information in IRIS. Authorized users include health care providers, local health departments, health plans, schools, and child care facilities. Additionally, health care providers may only obtain information specific to their own patients. Schools and childcare facilities may only access records specific to their enrollees.

II. Training Objectives

Upon completion of Standard Training, participants can:

- Access IRIS
- Explain User Roles
- Navigate IRIS
- Add new users and edit existing users
- Search for existing patients
- Enter new patients
- Edit patient demographic information and responsible persons
- Manage immunization information and update historical information
- Generate patient specific and organizational reports

III. Training Resources

- Help Desk (Phone: 1-800-374-3958)
Website: <http://www.idph.state.ia.us/ImmTB/Immunization.aspx?prog=Imm&pg=Iris>
- Online Help (Light bulb )
- User Manual
- Webinars (Live and Pre-recorded)
- Self-guided online training videos

Additional Information:

For self-guided online training videos, new users can go to IRIS at <https://iris.iowa.gov> and click the **Training** tab at the top of the page.

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IV. Accessing IRIS

IRIS is a web application; therefore a computer with an Internet connection and a web browser is required to access IRIS. IRIS has only been tested using Internet Explorer, version 8 and earlier and is the preferred web browser. Other browsers such as Firefox, Chrome and Safari have not been tested.

To access IRIS, launch a web browser and go to <https://iris.iowa.gov>. You will then see the login page.

Iowa's Immunization Registry Information System

HOME FORMS RELATED LINKS TRAINING

UAT Region

Org Code:

Username:

Password:

[Login](#)

DO NOT ATTEMPT TO
LOG ON UNLESS YOU
ARE AN AUTHORIZED
USER.

Hot Topics [HT-1](#) [HT-2](#)

Welcome to Iowa's Immunization Registry Information System (IRIS)! *Posted on 11/24/2010*
If you are an authorized user, please login using your unique combination of Organization Code, Username, and Password.

If you are a new user, please visit the training tab above, and contact your organization's Administrative User for further information. If you are from an organization requesting access for the first time, please contact the IRIS Help Desk to request enrollment information. IRIS Help Desk hours are 8:00 a.m. – 4:00 p.m. Monday through Friday, excluding government holidays. Contact the Help Desk at 800-374-3958.

This site will work optimally for users logging in with Internet Explorer browsers versions 6, 7, or 8. If you are using alternate browsers and experience display issues, please consider switching to Internet Explorer.

- [About Iowa Immunization Registry Information System](#)
- [About Iowa Medical Countermeasure](#)
- [About Public Immunization Record Access](#)
- [Disclaimer](#)
- [Contact Us](#)

Public Immunization Record Access

Welcome! This site offers the ability to view immunization records. You must provide a social security number or Medicaid ID to access the record. Click on the link below to begin searching for an immunization record.

[Public Immunization Record Access](#)

If you are having problems accessing an immunization record, please contact your health care provider.

Common IRIS Tools, Windows, and Menus

IRIS is divided into several sections and it may become necessary to use the vertical scroll bar to view all sections of the application.

1. Home tab:

- Hot topics-** These messages inform users of important announcements regarding the IRIS system, such as any downtime that is expected for website maintenance or any other notes that IDPH would like you to view pertaining to the system. These are put in by the IDPH staff and the date of when the latest message is posted is displayed - If there is more than one topic posted, you can click on the link in the right corner to view previous topics.
- Then there is a list of links that can be used:
- Information about the Iowa Medical Countermeasure:**
- Public Information Record:**
- Disclaimer of external websites**
- Help Desk Contact Information**
- Public Immunization Record Access**

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2. Forms tab:

- a. You will need to have Adobe Reader version 6.0 or higher to be able to read and open forms and reports in IRIS.
 - b. **State enrollment form** - Any organization that wants to use IRIS must complete and submit this form to the Iowa Immunization Program. .
 - c. **IRIS individual user agreement:** Any individual that wants to use IRIS within their organization must complete this form and provide it to the organization's Admin User of IRIS.
 - d. **Confidentiality policy:** Users of Iowa's immunization registry must read and abide by the IRIS Confidentiality Policy.
 - e. **Clinical/Medical Site FAQ**
 - f. **Parent/Adult FAQ:**
 - g. **Record request form**
 - h. **Adult Record Request form**

 - i. **Immunizations Records Report:** (these reports are not filled with any patient data they are just blank forms if someone needs them)
 - j. **Master Index Card**
 - k. **Certificate of Immunization**
 - l. **Provisional Certificate of Immunization**
 - m. **Certificate of Immunization Exemption**

 - n. **IRIS User Manual:** The User Manual explains the entire system as far as what the user can and cannot do in the system. The user manual is one of the most beneficial tools you will have in learning the system

 - o. **Data Exchange Specifications:** This section has links for the specifications for data exchange. More in depth training regarding Data Exchange will be done in Webinars and through other training sessions.

 - p. **Vaccine Codes** these are the vaccine codes related to data exchange.

 - q. **Policies**
 - i. Confidentiality policy
 - ii. IRIS and HIPAA
3. **Related links tab :** This section contains numerous links to external websites which are relevant to the immunization field.
4. **Training Section:** You can access information about webinars and view self-guided Training videos.
5. **Online Help – light bulb:** This is the online help button which displays page-specific help for wherever you are in the system.

Login to IRIS

To login each person MUST have their own individual account and should not use anyone else's access. *There is a three-part, case-sensitive, log in used by IRIS to authenticate users.*

- 1. Enter the **Org Code**, **Username**, and **Password**. (Given to you by your Organization)
- 2. Click **Login**.

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Additional Information:

- The Org Code is a short name for your organization.
- Each person accessing IRIS must have their own individual account.
- If your account is locked, call the Help Desk at 1-800-374-3958.
- The sessions will time out after 30 minutes of inactivity.
- Accounts are disabled after 60 days of no activity.
- New passwords are required every 90 days.



Menu Bar

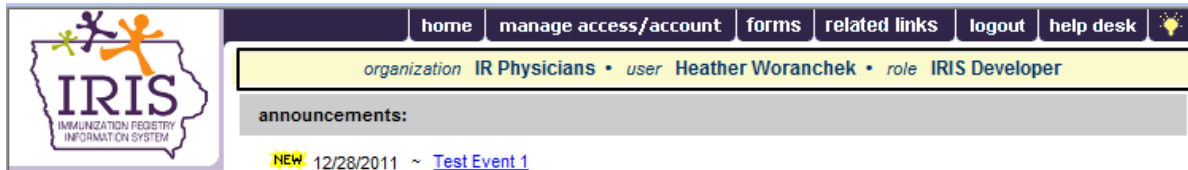
Several menu options are listed across the top of IRIS. All of these options appear on every page within the application. The following options are available in the menu bar:



- **Home:** Returns to the IRIS home page from anywhere within the application.
- **Manage Access/Account:** Loads the Manage Access/Account page.
- **Forms:** A list of hyperlinks for printing blank forms and support documentation.
- **Related Links:** A list of hyperlinks to other websites that contain information of interest to the immunization community.
- **Logout:** Logs you out of the current IRIS session.
- **Help Desk:** Displays contact information for the IRIS Help Desk.
- **Online Help:** Represented by a light bulb icon, online help displays page-specific help in a new window.

User Confirmation Bar

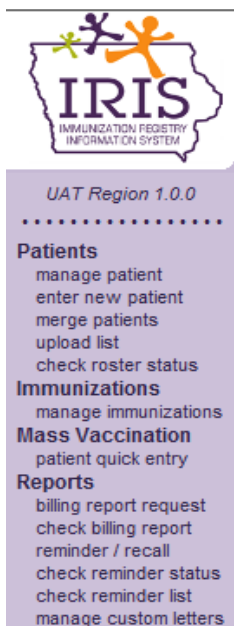
Directly beneath the menu bar is a row of information highlighted in light yellow. This row displays your organization, user, and role and remains at the top of each page in IRIS.



Menu Panel

The menu panel is purple and appears on the left side of all screens with IRIS. Selections in the menu panel are links used to navigate IRIS. They are grouped under categories including: Patients, Immunizations, Reports, Inventory, Maintenance, and others.

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Home Page

The home page is displayed when first logging into IRIS and can be quickly accessed from any page by clicking **home** in the menu bar across the top of the page. The home page is divided into the following sections:

IRIS
IMMUNIZATION REGISTRY
INFORMATION SYSTEM

UAT Region 1.0.0

Patients
manage patient
enter new patient

Immunizations
manage immunizations

Reports
reminder / recall
check reminder status
check reminder list
manage custom letters
check request status
vaccine eligibility
doses administered
group patients
check group status
assessment report
check assessment
benchmark report
check benchmark
ad hoc list report
ad hoc count report
ad hoc report status

Inventory
manage inventory
manage orders
manage transfers
shipping documents
transaction summary

home manage access/account forms related links logout help desk

organization • user • role Standard User

announcements:

- NEW 03/30/2012 ~ [Fairy Dust](#)
- 03/14/2012 ~ [Test Announcement](#)
- 02/01/2012 ~ [Love Fever](#)
- NEW 01/31/2012 ~ [Test Event 10](#)
- NEW 01/20/2012 ~ [Test Event 5](#)
- NEW 12/28/2011 ~ [Test Event 1](#)
- NEW 12/28/2011 ~ [Test Event 3](#)
- NEW 12/28/2011 ~ [Test Event 2](#)
- NEW 11/03/2011 ~ [ALERT vs IRIS](#)
- NEW 04/13/2011 ~ [ALERT IIS Manual Coming Soon](#)
- NEW 11/06/2010 ~ [Welcome](#)

[more announcements](#)

release notes:

03/29/2012 ~ [Release Version 11.1.2](#) New Release Note

Vaccine Order/Transfer Notification ...

Type	Shipped	Awaiting Return Shipment	Rejected
Order(s)	2	0	0
Transfer(s)	2	2	0

Active Inventory that is Going to Expire or Expired Lots with a Quantity ...

Site Name	Trade Name	Lot Number	On Hand	VFC	Exp Date
IR Physicians	Acel-Imune	25-549783625	74	Y	04/30/2012
IR Physicians	Botulinum-antitoxin	888333555	10	Y	04/30/2012

- **Announcements:** Contains important information regarding enhancements and maintenance for IRIS.
- **Release Notes:** Contains information regarding new releases of IRIS.

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- **IRIS Inventory:** Consists of four tables as listed below:
 - Vaccine Order/Transfer Notification: Lists orders/transfers that have been shipped, are waiting return shipment, or have been shipped.
 - Active Inventory that is Going to Expire or Expired Lots with a Quantity: Lists vaccines that are going to expire as well as lots which have expired and still have a quantity.
 - Inventory that is Running Low by Vaccine Group: Lists inventory that is nearly depleted sorted by vaccine group.
 - Inventory that is Running Low by Trade Name: Lists inventory that is nearly depleted sorted by trade name?

Editing My User Account

All current IRIS users will be migrated to the new version of IRIS and will have the same username and password they are currently using. Remember that the user ID and password given here are for the training environment only. IRIS allows **all users** to manage their own user account information. To verify or edit your user account information:

1. Click the **manage access/account** button in the menu bar.
2. Click **Edit My User Account** underneath “Manage My Account” in the menu panel.
3. On the “Edit User” page, you can change all information listed including; user first name, user last name, street address, email address, and phone number.
4. Click the **Save** button. If changes were made, the message “User Updated” appears at the top of the page.

The screenshot shows the 'Edit User' interface. On the left, a sidebar menu includes 'UAT Region', 'Welcome Heather Woranchek', 'Logout', 'Applications' (IRIS, IMC), 'Manage My Account' (with 'Edit My User Account' highlighted), and 'Manage Access' (Add Multiple Users, Add User, Edit User, List Organizations, Edit Organization). The main content area is titled 'Edit User' and contains the following fields: '* User First Name' (Heather), '* User Last Name' (Woranchek), 'User Middle Initial', 'Street Address', 'Other Address', 'P.O. Box', 'City', 'State' (dropdown menu showing 'IA'), 'Zip' (with a hyphen separator), 'Email', and 'Phone Number' (with hyphen separators for area code and extension). A 'Save' button is highlighted with a red box, and a 'Cancel' button is also visible.

V. User Roles

IRIS accommodates a variety of user roles. Each user has access to certain features in the web application based on the role assigned to that user. The most common user roles, sometimes referred to as levels of access, for IRIS are hierarchical as follows:

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Administrative User

This user is a main point of contact for IRIS within the health care organization. The Administrative User is responsible for the maintenance of all organization-specific information including managing users, clinicians, physicians, and schools. The Administrative User is authorized to run data exchange jobs and has access to all features of the Standard User role described in the following section.

Standard User

This is the primary user of IRIS. The Standard User has the ability to add, edit, and find patients. In addition, the Standard User manages immunization information, creates and maintains the organization's IRIS Inventory Module, and generates patient-specific and organizational-level reports. Examples of organizational-level reports include reminder/recall reports, Ad Hoc reports, and immunization benchmark reports.

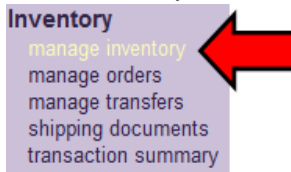
Patient Query-Only

This user has view-only access to view immunization information in IRIS and print reports.

VI.Managing Inventory

Providers can add both VFC and private inventory into IRIS to track. It is similar to how you currently add VFC shipments of Varicella. This is how you will be entering inventory that you receive as shipments from the VFC program into your inventory to track. All states are transitioning to a new vaccine management system with the CDC, and Iowa is scheduled to transition in April 2013. The process of manually adding inventory will be resolved upon transition to the new vaccine management system. Existing inventory will NOT be migrated to the new system, so ALL organizations must add inventory prior to using IRIS on June 4 (implementation date). First we will Manage Inventory:

1. Click on the **Manage Inventory** link in the Inventory section of the menu panel.



2. This will open the Manage Inventory page:

A screenshot of the 'Manage Inventory' page in the IRIS application. The page has a navigation bar at the top with links: 'home', 'manage access/account', 'forms', 'related links', 'logout', and 'help desk'. Below the navigation bar, there is a section titled 'Manage Inventory' with several buttons: 'Show Inventory for Sites...', 'Show Transactions for Sites...', 'Print Current Active Inventory...', 'Update inventory Alerts...', and 'Return to the Previous Screen...'. To the right of these buttons are 'Show Inventory', 'Show Transactions', 'Print Inventory', 'Update Alert Prefs', and 'Cancel' buttons. Below the 'Manage Inventory' section is an 'Inventory Alerts' section with a table titled 'Vaccine Order/Transfer Notification ...'. The table has columns: 'Type', 'Shipped', 'Awaiting Return Shipment', and 'Rejected'. The data rows are: 'Order(s)' with values 2, 0, 0 and 'Transfer(s)' with values 2, 2, 0. Below the 'Inventory Alerts' section is an 'Active Inventory that is Going to Expire or Expired Lots with a Quantity ...' section with a table. The table has columns: 'Site Name', 'Trade Name', 'Lot Number', 'On Hand', 'VFC', and 'Exp Date'. The data row is: 'IR Physicians', 'Acel-Imune', '25-549783625', '74', 'Y', and '04/30/2012'.

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3. Above the Inventory Alerts area is the **Manage Inventory** section:
- A. **Show Inventory Button:** This displays your organization's inventory.
 - B. **Show Transactions:** This displays your organization's transactions.
 - C. **Print Inventory:** This option will print your organization's inventory. Once you click on this button, your inventory will display in a printable PDF. This is a great tool to use if you need to do a hand count of the inventory to compare with what is listed in IRIS system. Click the browser's back arrow to go back to your previous screen once the PDF is open.

Current Active Inventory List					
Run Report on: 02/14/2012					
Organization: IR Physicians					
VFC PIN: Z90090					
Trade Name	Lot Number	VFC	Inv on Hand	Exp Date	Hand Count
AFLURIA	Afluria w/ NDC	Yes	85	02/13/2013	
Fluzone	Fluzone w/ NDC	Yes	70	02/13/2013	
Prevnam13	Prevnam / NDC	Yes	75	02/13/2013	

- D. **Update Alert Prefs:** This section will update your organization's Alert Preferences for inventory as shown on the inventory dashboard. You can set the inventory expiration alerts (it is currently defaulted to 30 days), update the low-level alert defaults by either trade name or vaccine group (this is defaulted to alert at 5 doses), and you can also select to update the low-level alerts by specific vaccine groups. Click Save when changes have been completed.

Inventory Expiration Alerts

The current system expiration default is 30 days.

Notify me when a lot will expire within days.

Update Low-Level Alert Defaults

Selection grouping ☐ Vaccine Group ☒ Trade Name

The current system low level default is 5 doses.

The custom organization low level default is doses.

Update Low-Level Alerts by Vaccine Group

(Click link to display all trade names for vaccine group.)

	Doses
DTP/aP	<input type="text"/>
HepB	<input type="text"/>
Polio	<input type="text"/>
Smallpox	<input type="text"/>
Td/Tdap	<input type="text"/>

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4. Under the Inventory Alerts section, you will see the same Inventory Dashboard that is on the IRIS homepage.

reminder / recall
check reminder status
check reminder list
manage custom letters
check request status
vaccine eligibility
doses administered
group patients
check group status
assessment report
check assessment
benchmark report
check benchmark
ad hoc list report
ad hoc count report

Inventory Alerts

Vaccine Order/Transfer Notification ...

Type	Shipped	Awaiting Return Shipment	Rejected
Order(s)	2	0	0
Transfer(s)	2	2	0

Active Inventory that is Going to Expire or Expired Lots with a Quantity ...

Site Name	Trade Name	Lot Number	On Hand	VFC	Exp Date
IR Physicians	Acel-Imune	25-549783625	74	Y	04/30/2012
IR Physicians	Botulinum-antitoxin	888333555	10	Y	04/30/2012

5. To display your organization's inventory, click on the **Show Inventory** button.

role **Standard User**

Show Inventory

Show Transactions

Print Inventory

Update Alert Prefs

Cancel

6. This area will allow you to **Add Inventory**, **Modify Quantity**, **Show Transactions**, and **Cancel**.

Manage Inventory

Add Inventory for Site (IR Physicians - IRPH - Z90090)...

Modify Quantity On Hand for Selected Sites....

Show Transactions for Sites....

Return to the Previous Screen....

Add Inventory

Modify Quantity

Show Transactions

Cancel

7. In the lower portion of this page you will see all of the inventory for your organization in a table with Non-VFC inventory at the top and VFC inventory at the bottom. You can filter this inventory by selecting the following options on the radio dial:

Show

☐ Active

☐ Inactive

☒ Non-Expired

☐ Expired

- a. **Active**, this shows all inventory that is active.

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- b. **Inactive**, this displays all inactive inventory. Example: if for some reason you received your shipment of flu vaccine in June and you don't want anyone to use it until Sept/Oct can make it "inactive" and then it isn't available in the list to choose from until made "active" again.
 - c. **Non-Expired**, this displays your inventory which is not expired.
 - d. **Expired**, this displays the inventory that has expired.
8. The inventory table is categorized by Trade Name, Lot Number, Inventory On Hand, Active, VFC, and Expiration Date. You may also see the inventory highlighted in different colors. If the Inventory is red, then the lot is inactive. If the inventory is pink, then the inventory is due to expire.

Select	Trade Name	Lot Number	Inv On Hand	Active	VFC	Exp Date
<input type="checkbox"/>	ACAM2000	Eron's test lot	30	Y	N	03/21/2015
<input type="checkbox"/>	ACAM2000	test 3.21.2012	0	N	N	03/31/2014
<input type="checkbox"/>	ACAM2000	75-11-1989	25	Y	Y	04/25/2012

9. From the table, a user can edit the inventory. Click on the blue hyperlink under the trade name for the Vaccine Inventory you would like to edit:

Select	Trade Name
<input type="checkbox"/>	ACAM2000
<input type="checkbox"/>	ACAM2000
<input type="checkbox"/>	ACAM2000

10. The Edit Vaccine Inventory Information page for the specific vaccine that was selected will display:

home
manage access/account
forms
related links
logout
help desk

organization
• user
• role
Standard User

Edit Vaccine Inventory Information

Site: IR Physicians

Trade Name: ACAM2000

Manufacturer: Sanofi Pasteur Inc.

NDC: 24992-*330-01

SMALLPOX VACCINE VERO CELLS 100 DOSES PER VIAL VIAL

Lot Number: 45777

Dose: .5

Expiration Date: 01/01/2013

VFC: No

Lot Active: Yes

Quantity on Hand: 146

Cost Per Dose (\$):

Save

Cancel

Add New

Modify Quantity On Hand

Action: Add

Amount:

Reason: New Shipment

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- i. Edit the information as necessary.
- ii. Click Save once completed to save the changes, Cancel to return to the Manage Inventory page or Add New to enter new inventory.



CAUTION: Editing any lot or NDC may affect all immunizations given already. Please edit with extreme caution. Also any changes made here will overwrite the existing data.



Add Inventory

Providers/Organizations can add both VFC and private inventory into IRIS to track. When adding inventory from VFC inventory it is similar to how you currently add VFC shipments of Varicella. All states are transitioning to a new vaccine management system with CDC, and Iowa is scheduled to transition in April 2013. To add inventory to track in IRIS:

1. From the Manage Inventory page; click on the **Add Inventory** button.

Manage Inventory	
Add Inventory for Site (IR Physicians - IRPH - Z90090)....	Add Inventory
Modify Quantity On Hand for Selected Sites....	Modify Quantity
Show Transactions for Sites....	Show Transactions
Return to the Previous Screen....	Cancel

2. From the Add Vaccine Inventory section, you can begin entering in vaccine information.

organization • user • role **Standard User**

Add Vaccine Inventory Information

Site: IR Physicians

Trade Name: ACAM2000

Manufacturer: Sanofi Pasteur Inc.

NDC:

Lot Number:

Dose:

Expiration Date:

VFC:

Lot Active: Yes

Quantity on Hand:

Cost Per Dose (\$):

Save Cancel

- a. Select the **Trade Name** for the Vaccine from the dropdown menu.
- b. Select the **Manufacturer** information from the dropdown menu. The information can be filtered either by the Trade Name or by the Manufacturer by selecting the radio dial.

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- c. Select the correct **NDC** number from the dropdown menu. Once the NDC is selected, you will get a description of the inventory. If there is no NDC on file, you will receive a message asking you to contact the IRIS help desk.

Note: You cannot add inventory without an NDC number.

- d. Enter in the **Lot Number**.
- e. Enter in the multitude of the **Dose** for the vaccine.
- f. Enter in the vaccine's **Expiration Date**.
- g. Select if the vaccine is a **VFC** lot.
- h. In the **Lot Active** field, the default is Yes (it must be Yes to be saved initially).
- i. Enter in the **Quantity on Hand**.
- j. Enter in the **Cost Per Dose** if your organization would like to record that information.
- k. Once all of the information has been entered, click **Save**.

Add Vaccine Inventory Information

Site: IR Physicians

Trade Name: DAPTACEL

Manufacturer: Sanofi Pasteur Inc.

NDC: 49281-0286-10

DAPTACEL 10X1 DOSE VIAL

Lot Number: 24454er

Dose: .5

Expiration Date: 04/02/2016

VFC: Yes

Lot Active: Yes

Quantity on Hand: 45

Cost Per Dose (\$):

Save

Cancel

3. You will then see a message at the bottom of the screen stating that “**Inventory was inserted successfully**”. Above the message, there is now an option to “**Modify the Quantity on Hand**” for that specific vaccine.

Modify Quantity On Hand

Action: Add

Amount:

Reason: New Shipment

inventory was inserted successfully.

- a. From the Action dropdown menu, select **Add** or **Subtract**.
 - b. Enter in the amount of the vaccine in which you are adding or subtracting.
 - c. Select a reason from the dropdown menu.
 - d. Click the **Save** button to save your changes.
4. To add more inventory, click the **Add New** button. **Attention:** When entering new inventory that is not already in IRIS, first click on Add new button as the information for the inventory you just added is editable and can be overwritten.

Save

Cancel

Add New

Delete

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- To return to the previous screen, select the **Cancel** button. Or to delete the inventory click on the **Delete** button. (Note there will only be a short window of time that inventory can be deleted).

Modify the Quantity

To modify the quantity of multiple vaccines from your inventory:

- Select the inventory you wish to modify by selecting the **checkmark box** next to each vaccine. Then click on the **Modify Quantity** button.

home manage access/account forms related links logout help desk

organization • user role Standard User

Manage Inventory

Add Inventory for Site (IR Physicians - IRPH - Z90090).... Add Inventory

Modify Quantity On Hand for Selected Sites.... **Modify Quantity**

Show Transactions for Sites.... Show Transactions

Return to the Previous Screen.... Cancel

Site: IR Physicians Show ☐ Active ☐ Inactive ☒ Non-Expired ☐ Expired

Select	Trade Name	Lot Number	Inv On Hand	Active	VFC	Exp Date
<input checked="" type="checkbox"/>	ACAM2000	45777	146	Y	N	01/01/2013
<input type="checkbox"/>	ACAM2000	Eron's test lot	30	Y	N	03/21/2015
<input type="checkbox"/>	ACAM2000	test 3.22.12	113	Y	N	03/31/2013
<input type="checkbox"/>	ACAM2000	test 3.21.2012	0	N	N	03/31/2014
<input checked="" type="checkbox"/>	ACAMBIS	84850004	950	Y	N	03/22/2015
<input checked="" type="checkbox"/>	Acel-Imune	1234567	93	Y	N	09/27/2014
<input type="checkbox"/>	Acel-Imune	673628	19.5	Y	N	11/22/2012

- In the **Modify Quantity on Hand for Selected Site(s)** section, you will see the inventory you selected on the previous screen. To modify your inventory:

Manage Inventory

Save Changes to Quantity On Hand for Selected Sites.... Save

Return to the Previous Screen.... Cancel

Modify Quantity On Hand for Selected Site(s)

Trade Name	Lot Number	Inv On Hand	Action	Amount	Reason
ACAM2000	45777	146	Add	10	New Shipment
ACAMBIS	84850004	950	Add	20	Spoilage reported by provider
Acel-Imune	1234567	93	Add		New Shipment

- Select a proper action from the Action dropdown menu, either **Add** or **Subtract**.
- Enter in the amount of inventory you are adding or subtracting.

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- c. Select the Reason for the modification from the Reason dropdown menu.
- d. Click the **Save** button or click **Cancel** to return to the previous screen.

Show Transactions

This section will display transactions for your organization. To display transactions:

The screenshot shows the 'Manage Inventory' page with four buttons on the right: 'Add Inventory', 'Modify Quantity', 'Show Transactions' (highlighted with a red arrow), and 'Cancel'.

1. On the Manage Inventory page click on the **Show Transactions** button.
2. Filter the transaction types you desire as well as the dates from and to. Once you have entered the information you want to display, click on the **View** button.

The screenshot shows the 'Vaccine Transactions for: IR Physicians- IRPH - Z90090' page. It has a navigation bar with 'home', 'manage access/account', 'forms', 'related links', 'logout', 'help desk', and a lightbulb icon. Below the navigation bar, it shows 'organization', 'user', and 'role Standard User'. The main section contains filters for 'Date Entered [From]:', 'To:', 'Date shot was given [From]:', 'To:', 'User Name:', 'Transaction Type:', 'Site Name:', 'Trade Name/Lot Number:', and 'Display Last 200 Records'. A red arrow points to the 'Date Entered [From]:' field, another red arrow points to the 'Date shot was given [From]:' field, and a third red arrow points to the 'View' button.

Note: One of the first two sections for “Date Entered” or “Date Shot was Given” must be entered or it will not generate the view.

3. The list of transactions will display:

Vaccine Transactions for Organization: IR Physicians - IRPH - Z90090							Record Count: 19	
Trans Date	Lot \ Trade Name	VFC	Type	Qty	Patient Name	Vaccine Eligibility	DOB	
09/20/2011	123456 \ ACAM2000	Yes	REC	100				
09/20/2011	2233445 \ DTP	Yes	REC	10				
09/20/2011	456655123 \ Hiberix	Yes	REC	15				
10/18/2011	695134 \ Pediarix	Yes	Immunize	-1	JONES, JOE		01/01/2010	
10/18/2011	FDD10015 6.3.1.1 \ Pentacel	No	Immunize	-1	JONES, JOE	A	01/01/2010	
10/18/2011	695134 \ Pediarix	Yes	Delete	1	JONES, JOE		01/01/2010	

IRIS Training Handout

4. Below the list is the **Vaccine Transactions Totals** table, which shows the **Transactions Codes**, **Transactions Description**, Trans Count and the Trans Value, which is the amount of doses affected.

Vaccine Transactions Totals			
Trans Code	Trans Description	Trans Count	Trans Value
REC	New Shipment	1	0
Immunize	Immunizations Given	4	-4
Delete	Immunizations Deleted	2	2
TRA	Doses Transferred	0	0
3	Spoilage reported by provider	0	0
4	Expired	2	98
5	Lost or damaged in transit to Provider	1	-10
6	Failure to store properly upon receipt by Provider	1	-4
7	Refrigeration failure reported by Provider	1	-15
11	Lost or unaccounted for in Provider inventory	0	0
12	Other - Not Usable, reported by Provider	0	0
13	Vaccine Administration Equipment Failure	1	-5
14	Shortened Expiration Date	1	-2
15	Pay back VFC vaccine with private vaccine	0	0
16	Pay back private vaccine with VFC vaccine	0	0
RECALL	Doses Recalled	1	-2
ADMIN	Doses Administered	0	0
RET	Doses Returned	0	0
ERR	Error Correction	1	10
RECON	Doses Reconstituted	0	0
Transaction Totals:		16	68

5. You can also Export the Transactions or Totals as a CSV (Comma Value Separated) file.

The screenshot shows the top navigation bar with links: home, manage access/account, forms, related links, logout, help desk, and a lightbulb icon. Below the navigation bar is a yellow banner with the text: organization • user • role Standard User. A Cancel button is located to the right of the banner. Below the banner are two buttons: Export Transactions as CSV and Export Totals as CSV. Red arrows point to these two buttons.

VII. Patients

Manage Patients



Note: The minimum search criterion requires the patient's exact birthday and one additional field.



To search for a patient in IRIS:

1. Click **manage patient** underneath "Patients" in the menu panel.

IRIS Training Handout

organization • user • role Standard User

Patient Search Criteria

Search by Patient
Minimum search criteria includes exact birth date and one additional field.

Last Name Mother's First Name
 First Name Phone - -
 Middle Name
 * Birth Date

Search by Patient ID
 * Patient ID

Search by IRIS ID
 * IRIS ID

2. Enter search criteria and click **Find**. If multiple matches are detected then review the patient data and click the **Last Name hyperlink** for the correct patient.

Patient Search Criteria

Search by Patient
Minimum search criteria includes exact birth date and one additional field.

Last Name Mother's First Name
 First Name Phone - -
 Middle Name
 * Birth Date

Search by Patient ID
 * Patient ID

Search by IRIS ID
 * IRIS ID

Possible Matches: 3

Last Name	First Name	Middle Name	Birth Date	Primary Patient Identifier	Mother's First	Gender	Status
SHOMMER	STANLEY	S	03/12/2011	60351	JENNIFER	M	A
SHORT	SHIRLEY		03/12/2011			F	A
SHORTCAKE	STRAWBERRY	L	03/12/2011	60231	FANNY	F	A
<input type="button" value="Up"/> AKA:	SHORTCAKE,BLUEBERRY						
AKA:	FIELD,STRAWBERRY						
AKA:	FIELD,STRAW L						



Note for Entering Names

On all first and last names entered for patient searches, IRIS disregards spaces, apostrophes, and hyphens entered. Do not use one letter for the search fields unless it is their true name as one character searches return only exact matches.



3. The **Patient Demographic screen** will now be displayed if there was an immediate match from the initial search (step 1 above) or the blue hyperlink was clicked from the multiple match results.

IRIS Training Handout

VIII. Patient Demographic Screen Overview

The demographics page will allow you to verify your search for the correct patient and change or update the personal data of the patient that is not immunization related.

The following sections are displayed on the Patient Demographic Screen:

Personal Information, Patient AKA (Also Known As), Organizational Information, Patient Information, Address Information, Responsible Persons, Patient Comments and Patient Notes.

1) Personal Information Section:

- a. **Displays:** Last Name, First Name, (note the blue required fields with an asterisk) Middle Name, Suffix, Birth Date, Mother's Maiden Last and First name, Gender, SSN -

IRIS Training Handout

Social Security Number, Medicaid ID, Birth Order, Birth Country, Birth State, Birth County, and Patient Identifier.

- b. This section also has the **Save** options once information is input or edited. Note: There is more than one way to Save:
- c. You can enter a patients information throughout all the sections and then hit **Save** and it will save all the data or you can periodically hit save as you feel comfortable.

Note: Do not leave the page without saving or hit the back browser or the entries may be lost. Always remember to save before logging out.

Save
History/Recommend
Reports
Cancel

- i. **Save** when clicked, will save the patient data and stay in patient demographics area.
- ii. **History/Recommend** will save the patient data first and then it will open the immunization history/recommend page for the current patient.
- iii. **Reports** will save first and then open to the patient's specific reports page.
- iv. **Cancel** will NOT save and will return you to the previous screen.



Note: To open or close the sections just click on the arrow to the right of the title; it will show an arrow down when it is closed and an arrow up when it is opened.



Last Updated by IR Physicians on 04/02/2012

Patient AKA (3) ▼

Organization Information ▼ ←

Patient Information ▲ ←

[\[back to top\]](#)

- 2) **Patient AKA:** If the patient has had a previous name or has an additional name that is used it can be viewed or a new AKA can be added.

Patient AKA (2) ▲

[\[back to top\]](#)

Patient AKA Listing

	* Last Name	* First Name	Middle Name
<input type="checkbox"/>	SHORTCAKE	BLUEBERRY	
<input type="checkbox"/>	FIELD	STRAWBERRY	

Add New AKA

* Last Name

* First Name

Middle Name

IRIS Training Handout

- 3) **Organization Information** is information directly related to your organization and affects certain reports. This is also where the patient identifier for your organization can be input or changed.

The screenshot shows the 'Organization Information' form. It includes a 'back to top' link, a 'Status' dropdown set to 'ACTIVE', an 'Allow Reminder and Recall Contact?' dropdown set to 'Yes', a 'Provider- PCP' dropdown set to 'Jones, Jim', and a 'Last Notice' date of '2012-04-02'. There is a '* Tracking Schedule' dropdown set to 'ACIP'. Below this is a section titled 'Patient Identifiers' with a table showing two identifiers: '565678' and '60231'. The '60231' identifier is marked as 'Primary'. At the bottom, there is an 'Add Patient Identifier' section with a text input field for the 'Patient Identifier' and an 'Add Patient Identifier' button.

- 4) **Patient Information.** This section gives additional information about the patient. Here you can edit **Races**, **Ethnicity** and **Language Spoken** (English or Spanish are the only options – this will affect the language of the reminder/recall letter that is sent). **School** is a drop down that will be populated by your Organization's Administrative User and **Occupation** has a drop down for occupations that are relevant to maintaining updated immunizations or events. Both School and Occupation will be useful later for reports.

The screenshot shows the 'Patient Information' form. It includes a 'back to top' link and a section titled 'Race (select all that apply)' with checkboxes for 'American Indian or Alaska Native', 'Asian', 'Native Hawaiian or Other Pacific Islander', 'Black or African-American', 'White', and 'Other Race'. The 'Other Race' checkbox is checked. Below this is an 'Ethnicity' dropdown set to 'Not Hispanic or Latino'. To the right, there are dropdowns for 'School', 'Occupation', and 'Language Spoken' (set to 'ENGLISH').

- 5) **Address Information:** Edit or add the patient's address information. *Remember a viable address is required for the reminder/recall letter to be sent and note that it will overwrite any data currently populated.*

The screenshot shows the 'Address Information' form. It includes a 'back to top' link, a 'view Patient Address History' link, and a 'Last Updated 04/05/2012' timestamp. There is a 'No Viable Address' checkbox. The 'Start Date' is '04/05/2012'. The 'Street Address' is '7109 DANBURY COURT'. The 'Phone Number' is '641 - 767 - 2382'. The 'Extension' is empty. The 'E-Mail' is empty. The 'P.O. Box' is empty. The '* Zip' is '50831'. The 'City' is 'ARISPE'. The 'State' is 'IA'. The 'County' is 'Union'.

IRIS Training Handout

- 6) **Responsible Persons.** This section allows you to identify, edit or add patient emergency contact information or will house the information for a Parent/Guardian. *Note: the Responsible Person can be sent the Reminder/Recall letters if the information is entered.*

*Note: You must hit the **Add New** button to clear out any data for a pre-existing Responsible Person before you enter the new information otherwise it will overwrite the previous data.*

- 7) **Patient Comments.** This section allows you to enter immunization related comments. These comments may affect the immunizations recommended for the patient in IRIS.

Note: In the previous version of IRIS this was the information recorded in the "Health Information" tab of the patient record.

- 8) **Patient Notes.** This is a text field for any non-sensitive information that must be noted such as, "Child has excessive fear of needles" or "Child difficult to vaccinate due to biting".

IRIS Training Handout



Note: Patient Notes should not be used for sensitive or confidential medical information. Once entered and saved, a patient note cannot be deleted by a user. Contact the Help Desk if further assistance is needed.



- 9) After you have entered in all of the Patient information, click on the **Save** button the Patient Information area to make sure all of the data you have edited has been saved to the patient record in IRIS.

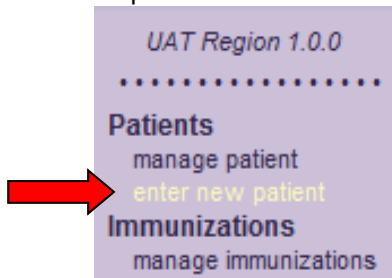
IX. Enter a New Patient



Note: Required fields use blue text as opposed to black text and include an asterisk. Always search for a patient before entering a new patient to avoid duplication.



To enter a new patient in IRIS: Click **enter new patient** underneath “Patients” in the menu panel.



- 1) **Personal Information** Section:

Add Patient

Personal Information		Save
* Last Name	Unknown	History/Recommend
* First Name	SSN	Add Next
Middle Name	Medicaid ID	Cancel
Suffix	Birth Order (for multiple births)	
* Birth Date	Birth Country UNITED STATES	
* Mother's Maiden Last	Birth State	
* Mother's First Name	Birth County	
Patient Identifier		

- a. **Enter Last Name, First Name**, (note the blue required fields with an asterisk) middle name if have or letter for middle name.
- b. **Suffix** – which has a drop down arrow, click on the arrow to choose options.

IRIS Training Handout

- c. **Birth Date** is required and you have the choice of typing in the month, day and year – notice the format 2 digit month, 2 digit date, and 4 digit year – or you can pick from the calendar.

The screenshot shows the 'Update Patient' form. In the 'Personal Information' section, the 'Birth Date' field is highlighted with a red arrow and contains the value '03/12/2011'. A calendar pop-up is displayed over the date field, showing the month of March 2011. The calendar has a grid with days of the week (Sun, Mon, Tue, Wed, Thu, Fri, Sat) and dates (1-31). The date 12 is selected. The form also shows other fields like 'Last Name' (SHORTCAKE), 'First Name' (STRAWBERRY), 'Middle Name' (L), 'Suffix', 'Mother's Maiden Last' (On File), and 'Mother's First Name' (FANNY).

- d. **Mother's Maiden Last** and **First** name. Once mother's maiden last name is entered, it will be kept confidential and display "(On File)". Although IRIS will allow you to save the record without the field completed, you will be prompted to gather this information for future de-duplication of patients.
- e. **Gender** is required; choose from the drop down of Male, Female, and Unknown. Note the gender field defaults to unknown, so it is important to update this.
- f. **SSN - Social Security Number**. Like Mother's Maiden Last Name, once it is entered, it will say on file for confidentiality.
- g. **Medicaid ID** – Note do not use the sequence number.
- h. **Birth Order** is only used for multiple births
- i. **Birth Country** will default to the United States or select from the drop down list.
- j. **Birth State** is also a drop down list in which you can select the state – IA is default.
- k. **Birth County** section is only for the state of Iowa. If known, select the appropriate birth county from the drop down list.

The screenshot shows the 'Personal Information' form. Fields include: 'Last Name' (SHORTCAKE), 'First Name' (STRAWBERRY), 'Middle Name' (L), 'Suffix' (dropdown), 'Birth Date' (03/12/2011), 'Mother's Maiden Last' (On File), 'Mother's First Name' (FANNY), 'Gender' (Female), 'SSN (On File)', 'Medicaid ID' (12345), 'Birth Order' (for multiple births), 'Birth Country' (UNITED STATES), 'Birth State' (IOWA), 'Birth County' (Union), and 'Patient Identifier' (60231). Red arrows point to the 'Birth Country', 'Birth State', 'Birth County', and 'Patient Identifier' fields. On the right side, there are buttons for 'Save', 'History/Recommend', 'Reports', and 'Cancel'.

- l. **Patient Identifier** is patient's id or medical record number for your organization to track the patients easier.

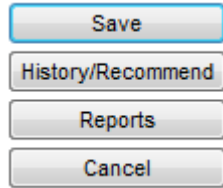


Note: the patient identifier displays on this page if one has been entered and set to primary, to edit or add an identifier see the "organization information" section below.



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- 2) This section also has the **Save** options once information is input. There is more than one way to Save:
- You can enter a patients information throughout all the sections and then hit **Save** and it will save all the data or you can periodically hit save as you feel comfortable.



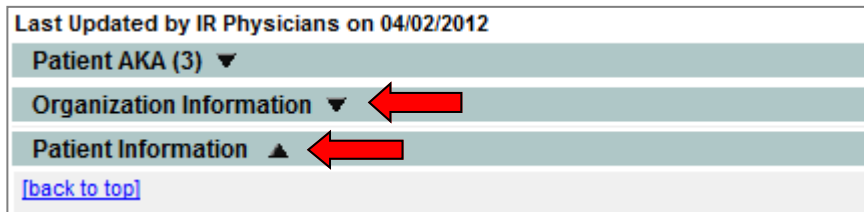
- Save** when clicked, will save the patient data and stay in patient demographics area.
- History/Recommend** will save the patient data first and then it will open the immunization history/recommend page for the current patient.
- Reports** will save first and then open to the patient's specific reports page.
- Cancel** will NOT save and will return you to the previous screen.



Note: Do not leave the page without saving or hit the back browser or the entries may be lost. Always remember to save before logging out.



To open or close the sections just click on the arrow to the right of the title; it will show an arrow down when it is closed and an arrow up when it is opened.



- 3) **Patient AKA:** If the patient has had a previous name or has an additional name that is used please enter the data as IRIS will use this for patient searches.

A screenshot of the 'Patient AKA' section. At the top is a header 'Patient AKA (3)' with an up arrow and a red arrow pointing to it. Below is a link '[back to top]'. The main section is titled 'Patient AKA Listing' and contains a table with three columns: '* Last Name', '* First Name', and 'Middle Name'. The table has three rows of data. Below the table is a section 'Add New AKA' with three input fields: '* Last Name', '* First Name', and 'Middle Name'. Red arrows point to the first and second fields. To the right of the fields is an 'Add AKA' button with a red arrow pointing to it.

- To add an AKA; the **Last name** and **First Name** are required fields.
- Middle initial is optional.
- Click on the **Add AKA** button to have the information display in the Patient AKA Listing.

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Note: Clicking the “Add AKA” will only populate it in the Patient AKA Listing area; the “Save” in the Patient Information area at the top of the page must be clicked to record it in IRIS. Also once an AKA is entered, the IRIS help desk must be contacted to have it removed.



- 4) **Organization Information** is information directly related to your organization and affects certain reports. This is also where the patient identifier for your organization can be input or changed.

The screenshot shows the 'Organization Information' form. At the top is a '[back to top]' link. Below it are five fields: 'Status' (dropdown menu set to 'ACTIVE'), 'Provider-PCP' (dropdown menu), '* Tracking Schedule' (dropdown menu set to 'ACIP'), 'Allow Reminder and Recall Contact?' (dropdown menu set to 'Yes'), and 'Last Notice' (text field showing '2012-04-02'). Below these fields is a section titled 'Patient Identifiers' which contains a table with two columns: 'Remove Identifier' and 'Patient Identifier'. The table has two rows: one with a checkbox and the identifier '565678', and another with a checkbox and the identifier '60231'. Below the table is an 'Add Patient Identifier' section with a text input field and an 'Add Patient Identifier' button. Red arrows point to the 'Status', 'Provider-PCP', '* Tracking Schedule', 'Allow Reminder and Recall Contact?', and 'Last Notice' fields.

- Active field:** This section will default to “Active” which means the patient will be receiving services from your organization. If you select an Inactive status from the dropdown menu, this patient becomes inactive for your organization only.
- Provider-(PCP).** From the dropdown choose the primary care physician or the health care organization – these will be pre-populated from your organizations administrative user.
- Tracking Schedule.** The tracking schedule field is required and is the schedule that the immunization data will follow; it is defaulted to the ACIP (Advisory Committee on Immunization Practices) schedule.
- Allow Reminder and Recall Contact:** Choose if the patient should be sent a reminder/recall report of immunizations due or overdue. This defaults to yes but if the parent or patient does not want a notice sent, choose no in the drop down box.
- Last Notice** area lists the date the last notice for the Reminder and Recall letter was generated. It will be blank until a reminder/recall letter is sent for that patient.



Note: If you generate reminder or recall letters, the patient’s status will need to be “Active”, the “Reminder/Recall Contact” field is listed as “Yes” and there must be sufficient address information in the Address Information section. If any of these requirements are not met, the letter will not be generated.



- The **Patient Identifier** area is where you can enter the patient’s id or medical record number for your organization to track the patient easier.

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Patient Identifiers

Remove Identifier	Patient Identifier	Primary
<input checked="" type="checkbox"/>	565678	<input type="radio"/>
<input type="checkbox"/>	60231	<input checked="" type="radio"/>

Add Patient Identifier

Patient Identifier: Add Patient Identifier

- i. Type in the patient id.
- c) Click on the **Add Patient Identifier** button; it will populate in the Patient Identifier list. If there is more than one Identifier for the organization then select the radio button next to the identifier to become the Primary Identifier if desired.
- ii. Remove Identifier: To remove an identifier click on the box in front of the identifier you would like to remove and click **Remove Identifier** button.
Note: The identifier should not be a social security number or the Medicaid number for confidentiality reasons. Also remember that even though it appears to be a part of the record you still have to hit the save button in the Patient Information area to make it an addition to the record.

5) **Patient Information.** This section gives additional information about the patient.

Patient Information

[\[back to top\]](#)

Race (select all that apply)

- ☐ American Indian or Alaska Native
- ☐ Asian
- ☒ Native Hawaiian or Other Pacific Islander
- ☐ Black or African-American
- ☐ White
- ☒ Other Race

Ethnicity

School

Occupation

Language Spoken

Here you can select the appropriate **Races**, **Ethnicity** and **Language Spoken** (English or Spanish are the only options – this will affect the language of the reminder/recall letter that is sent). **School** and **Occupation** are drop downs that are pre-populated by the Organizations Administrative User and will be useful for reports.

6) **Address Information:** enter the patient's address information. *Remember a viable address is required for the reminder/recall letter to be sent.*

Address Information

[\[back to top\]](#)

[view Patient Address History](#)

Last Updated 04/05/2012

No Viable Address ☐

Start Date

Street Address

Other Address

P.O. Box

*** Zip**

City **State**

County

Phone Number

Extension

E-Mail

IRIS Training Handout

- a. **View Patient Address History** link: click to view address history for the patient.
 - b. **No Viable Address** checkbox should be checked if letters have been returned as not deliverable.
 - c. **Start Date** will automatically populate to the current date when entering a new address and will not let you enter a previous date – it will let you put in a future date if a patient knows a new future address.
 - d. **Zip:** is a required field and will not save the patient record without the zip code.
- 7) **Responsible Persons.** This section allows you to identify patient emergency contact information or will house the information for a Parent/Guardian. *Note: the Responsible Person can be sent the Reminder/Recall letters if the information is entered.*

Responsible Persons (2) ▲

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Responsible Person listing Add New

Review	Remove	Name	* Relationship	Primary
<input type="radio"/>	<input type="checkbox"/>	FIELDS, FANNY 7109 DANBURY COURT ARISPE IA, 50831	Mother	<input checked="" type="radio"/>
<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	SHORTCAKE, SAM 2021 STRAWBERRY FIELDS FO ARISPE IA, 50831	Grandparent	<input type="radio"/>

Enter details for the new responsible person, then click 'Apply Changes'

* Last Name Street Address Apply Changes

* First Name Other Address

Middle Name P.O. Box

* Relationship City

Phone Number - - State IA

Extension Zip +4

E-Mail

- a. **Last Name, First Name, and Relationships** are required fields if entering a responsible person.
 - b. **Relationships:** is a dropdown box with numerous options, choose the appropriate option.
 - c. **Review** or Edit an existing Responsible Person by clicking on the **Review** radio button next to the name of the person you wish to review or edit. If changes are made select **Apply Changes** to update the section (note this will overwrite the existing data).
 - d. **Remove** an existing Responsible Person by selecting the Remove checkbox next to the Responsible Person you wish to delete. Click the **Remove** button and then press the Save button at the top of the page in the Patient Information area to save your work.
 - e. Once there are Responsible Persons listed, to enter a new Responsible Person, click the **Add New** button and enter the required fields.
*Note: You must hit the **Add New** button to clear out any data for a pre-existing Responsible Person before you enter the information otherwise it will overwrite the previous data.*
- 8) **Patient Comments.** This section allows you to enter immunization related comments. These comments may affect the immunizations recommended for the patient in IRIS.

IRIS Training Handout

Patient Comments (2) ▲

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Patient Comment listing

Remove	Start Date	End Date	Patient Comment
<input checked="" type="checkbox"/>			Allergy to egg ingestion (anaphylactic)
<input type="checkbox"/>	01/06/2012		History of varicella (chicken pox)

Enter New Patient Comment

* Patient Comment: History of varicella (chicken pox)

Start Date: End Date: Add Comment

- a. Enter a new comment by choosing the appropriate comment from the Patient Comment dropdown list.

Allergy to baker's yeast (anaphylactic)
 Allergy to egg ingestion (anaphylactic)
 Allergy to gelatin (anaphylactic)
 Allergy to latex (anaphylactic)
 Allergy to neomycin (anaphylactic)
 Allergy to POLYMYXIN B
 Allergy to streptomycin (anaphylactic)
 Allergy to thimerosal (anaphylactic)
 Anaphylactic (life-threatening) reaction to previous dose of this vaccine or any of its components
 Arthus type reaction to previous dose of tetanus containing vaccine.
 Asthma or other chronic pulmonary disease
 Chronic Health Condition
 Collapse or shock like state within 48 hours to previous dose of DTP/DTaP
 Convulsions (fits, seizures) within 72 hours of previous dose of DTP/DTaP

- i. Enter a **Start Date** of the comment if applicable. Although it is not required, a Start Date is important as the comment can then be evaluated against the tracking schedule.

* Patient Comment: History of varicella (chicken pox)

Start Date: End Date: Add Comment

- ii. Enter an **End Date** if applicable and then the comment will stop being evaluated against the tracking schedule.
- b. Click the **Add Comment** to update this section.
- c. Remove existing comments by selecting the **Remove checkbox** next to the comment you wish to delete on the Patient Comment Listing table. Click the **Remove** button.

Patient Comment listing

Remove	Start Date	End Date	Patient Comment
<input checked="" type="checkbox"/>			Allergy to egg ingestion (anaphylactic)
<input type="checkbox"/>	01/06/2012		History of varicella (chicken pox)

IRIS Training Handout



Note: In the previous version of IRIS this was the information recorded in the “Health Information” tab of the patient record. Also make sure after adding or removing a comment to hit the Save button in the Patient Information area to record it.



- 9) **Patient Notes.** This is a text field for any non-sensitive information that must be noted such as, “Child has excessive fear of needles” or “Child difficult to vaccinate due to biting”.

Patient Notes (1) ▲

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[Create New Note](#)

Please do not include confidential information in the patient notes. Patient Notes can be viewed by any provider organization with access to the registry.

Enter Text of Note:

Child is sensitive to Band Aids

Historical Notes [printer-friendly version](#)

Created by	Create Date	Note
plano, nanette	04/05/2012 10:28 AM	Child difficult to vaccinate due to biting

- a. Type the note in the free text field.
- b. Click Save at the top of the page in the Patient Information area to save the note.



Note: Patient Notes should not be used for sensitive or confidential medical information. Once entered and saved, a patient note cannot be deleted by a user. Contact the Help Desk if further assistance is needed.



- 10) After you have entered in all of the Patient information, click on the **Save** button the Patient Information area to make sure all of the data you have entered has been saved to the patient record in IRIS. A message will display at the top of the page informing you the patient was saved successfully.

Patient record successfully added

Update Patient

If you receive a “Patient Match Detected” message, see below:

IRIS Training Handout

organization • user • role **Standard User**

Patient Match Detected

Based on the information you entered, the system has determined the patient may already exist in IRIS. Please review the demographic information for the patient below and if it does not appear to be your patient, you may then click the **Create New Patient** button.

Please keep in mind that if you choose to ignore a patient match and create a new record, that patient will have two records in IRIS, neither of which will be complete and accurate!

Create New Patient

Possible Patient Matches: 1

Last Name	First Name	Birth Date	Primary Patient ID	Mother's First Name	Gender	Status
SHELLMAN	TRAVIS	11/05/1979		MARY JO	M	A

1. Review the patient information listed to verify that the patient being entered is not already in IRIS. If it is a correct match then click on the last name link to be taken to the Patient demographic screen to update as necessary.



Note: This is why searching twice prior to adding a new patient is critical as if the match is your patient the data just entered will not be added to this patient.



2. If the match detected is not the patient then click the **Create New Patient** button. A message will pop up verifying that you want to still create a new patient. Click **OK** if you want to create the new patient record or click **Cancel** to cancel out.

Patient Match Detected

Based on the information you entered, your patient is likely already in IRIS and is one of the patients listed below. Please review the demographic information for each of these patients and if none of them appears to be your patient, you may then click the **Create New Patient** button.

Please keep in mind that if you choose to ignore a patient match and create a new record, that patient will have two records in IRIS, neither of which will be complete and accurate!

Create New Patient

Possible Patient Matches: 2

Last Name	First Name	Birth Date	Primary Patient ID	Mother's First Name	Gender	Status
PLANO					F	
PLANO					F	

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Message from webpage

Are you sure you would like to **OVERRIDE** the System Match?

OK Cancel

3. Once you click **OK** then the new patient record will be saved and will state that the "Patient record was successfully added".

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X. Immunizations

Immunization information for a specific patient may be accessed one of two ways:

1. Click **Manage Patient** under the Patients section of the menu panel. This will display the Patient Search page. For information on finding patients, refer to the Managing Patients section. Once a patient is retrieved, click the **History/Recommend button** to display the patient's Immunization Record page.

Or

2. Click **Manage Immunizations** under the Immunizations section of the menu panel. This will bring up the Patient Search page. For information on finding patients refer to the Managing Patients section. Once a patient is retrieved, the patient's Immunization Record page displays.

The Immunization Records page holds a large amount of information on each patient in IRIS. This page has different sections, including: Patient Information, Immunization Record, and Vaccines Recommended by Selected Tracking Schedule:

Patient Information Section: In this section, you will see the patient's information such as: Name, DOB, Gender, Tracking schedule, Patient ID, the patient's address, and any comments you should be alerted too. If there is more than one comment, you will be able to scroll through the comments.

Patient Information				
Patient Name (First - MI - Last)	DOB	Gender	Tracking Schedule	Patient ID
BUGS BUSTER BUNNY	03/01/2011	M	ACIP	2323
Address/Phone 2343, CARROT PATCH, DES MOINES, IA 50321 (324) 545-4653				
Comments {1 of 2} ... 03/29/2011 ~ Immunity: hepatitis B				

Below the patient information section, you will see the patient's age as well as patient notes by clicking on the patient notes link. You will then see the follow navigation buttons:

Current Age: 1 year, 1 month, 4 days					
Patient Notes (2) view or update notes					
Add New Imms	Add Historical Imms	Edit Patient	Reports	Print Record	Print Confidential Record

- a. **Add New Imms:** This button will add new immunization to the patient's record from IRIS inventory or Other inventory. We will go over this in just a bit
- b. **Add Historical Imms:** This button will add historical immunization to the patient's record. We will also go over this in just a little bit
- c. **Edit Patient:** This button will take you back to the patient demographic page
- d. **Reports:** This button will take you to the patient report section, which contains many patient specific reports we will discuss later
- e. **Print Record:** You can click on the Print Record button to view a printable record of the patient's History Recommend Page. Here, you will see the patient's contact information

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at the top of the screen as well as patient notes. This record contains more personal info. To print this file, click on the **“File”** tab on your browser and select the **Print** option.

- f. **Print Confidential:** This button displays the same patient immunization record without as much patient identification. To print this file, click on the **“File”** tab on your browser and select the **Print** option.

Immunization Record: This will display the patient’s current immunization record that has been entered in to IRIS so far. In this section, you will see:

Immunization Record								
Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist?	Edit
DTP/aP	04/12/2011	1 of 5	DTaP,5 pertussis antigens [DAPTACEL ®]	Full				
	05/10/2011	2 of 5	DTaP,5 pertussis antigens [DAPTACEL ®]	Full				
	09/01/2011	3 of 5	DTaP,5 pertussis antigens [DAPTACEL ®]		No		Yes	
HepA	03/01/2012	1 of 2	HepA, NOS [HepA, NOS ®]	Full		Yes		
HepB	03/01/2012	1 of 3	HepB, NOS [HepB ®]	Full				
Influenza-seasn	03/01/2012	1 of 2	Influenza, NOS				Yes	
MMR	03/01/2012	1 of 2	MMR [MMR II ®]	Full				
PneumoConjugate	03/01/2012	1 of 2	PCV7 [Prevnar7 ®]				Yes	
Polio	04/12/2011	1 of 4	Polio-Inject [IPOL ®]	Full				
	05/10/2011	2 of 4	Polio-Inject [IPOL ®]	Full				
	06/01/2011	NOT VALID	Polio-Inject [IPOL ®]	Full				

- a. **Vaccine Group:** All of the vaccines a patient has received so far are listed alphabetically by vaccine group and then ordered by date given.
- b. **Date Admin:** This is the date the vaccine was administered. If you click on the blue hyperlink, a popup window will display the tracking schedule for that immunization and it will also highlight the dose in a vaccine series.
- c. **Series:** The number in the series of vaccines for the patient. Please note that if you may see a **NOT VALID** message in this section. This mean this dose was not valid for this patient. If you click on the date hyperlink. The tracking schedule will populate and in the window, it will show why that immunization is not valid
- d. **Vaccine Trade Name:** This lists the vaccine trade name
- e. **Dose:** The dose size of the vaccine (full, half, or multiple)
- f. **Owned:** If the section under Owned is blank, this indicates your organization owns the vaccine, meaning your organization entered the information for a particular vaccine. If ‘No’ is in the owned field, another organization has entered the information for the immunization. You can click on the **NO** link and it will show the organization that entered the immunization.
- g. **Reaction:** The next section is reaction, which indicates if the patient had a recorded reaction to the immunization. If there was a reaction, there will be a Yes in the field which is a hyperlink. When you click the hyperlink, you will see the reaction the patient had.
- h. **Hist?:** This section indicates whether or not an immunization is historical. If there is a Yes in this field, this means that the immunization was historical. An historical immunization is an immunization that was not administered by your organization and was not previously record in the IRIS system.

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- i. **Edit:** You can edit immunizations that are owned by your organization as well as historical immunizations.

Vaccines Recommended by Selected Tracking Schedule: This section shows dates recommended for vaccinations by tracking schedule. This section displays:

Vaccines Recommended by Selected Tracking Schedule					
Select	Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
<input type="checkbox"/>	DTP/aP	DTaP, NOS	03/01/2012	03/01/2012	10/01/2012
<input type="checkbox"/>	HepA	HepA, NOS	09/01/2012	09/01/2012	04/01/2013
	HepB	HepB, NOS	Immunity Recorded for Vaccine Group		
<input type="checkbox"/>	Hib	Hib, NOS	03/01/2012	03/01/2012	03/01/2012
<input type="checkbox"/>	Influenza-seasonal	Influenza, NOS	03/29/2012	03/29/2012	04/26/2012
<input type="checkbox"/>	MMR	MMR	03/29/2012	03/01/2015	03/01/2016
<input type="checkbox"/>	PneumoConjugate	PCV13	04/26/2012	05/01/2012	07/01/2012
<input type="checkbox"/>	Polio	Polio, NOS	06/29/2011	09/01/2011	10/01/2012
	Varicella	Varicella	Contraindicated		
					Add Selected

- a. **Add Selected:** Here, you can select the appropriate boxes under the “add selected” if you would like to add multiple recommended immunizations at once.
- b. **Vaccine Group:** The vaccines in the tracking schedule are listed by they are also listed by vaccine group. By clicking on the hyperlink, you will again see the tracking schedule for that specific vaccination.
- c. **Vaccine:** You will see the vaccines listed
- d. **Earliest Date:** This is the earliest date the vaccine can be administered according to the ACIP tracking schedule
- e. **Recommended Date:** This is the recommended date the vaccine can be administered according to the ACIP tracking schedule
- f. **Past Due Date:** This is the past due date for the immunization according to the ACIP tracking schedule.
- g. Notice the colors on the chart. Green indicates when the date for a recommended immunization is due or is past due. Gray indicates the series is complete, or other notes such as the maximum age exceeded or a contraindication.

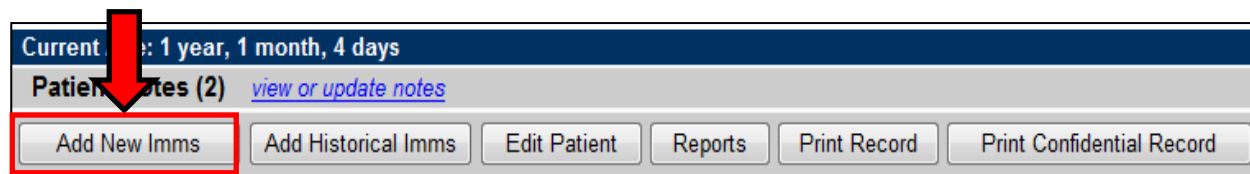
Entering Immunizations

There are three distinct ways an immunization can be recorded for the patient, either via the Add New Imms button, the Add Selected button, or if you are adding a historical immunization, via the Add Historical Imms button. When adding immunizations by the Add New Imms button or the Add Selected button, you have the option of selecting whether or not the immunization is coming from your organization’s inventory.

1. To add new immunizations via the **Add New Imms** button:

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- a. Click the **Add New Imms** button to display the Add New Immunizations page.

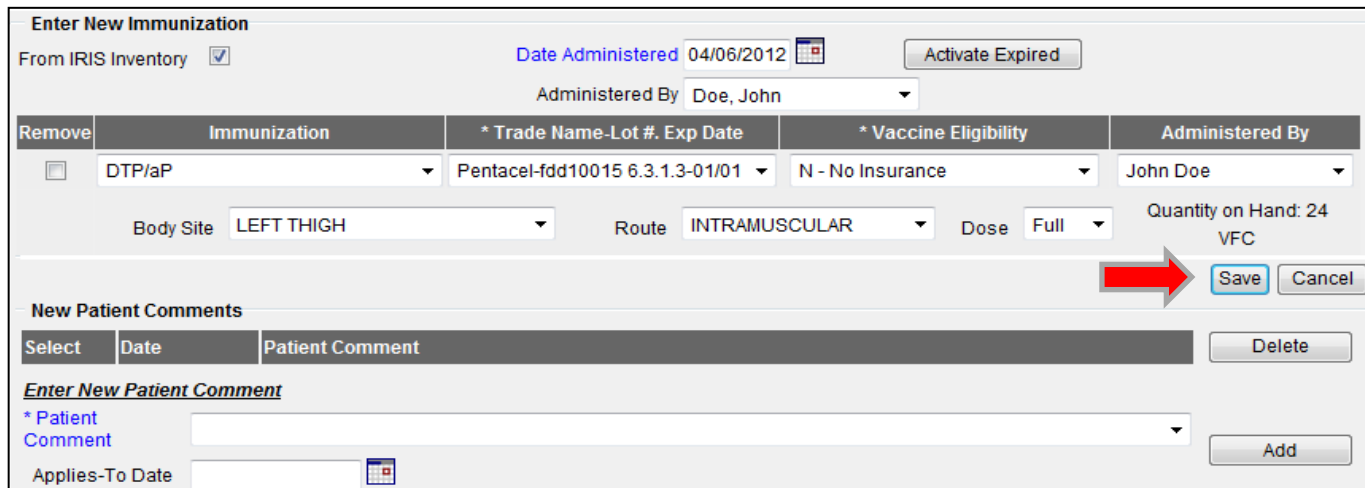


Current Age: 1 year, 1 month, 4 days

Patient Notes (2) [view or update notes](#)

Add New Imms Add Historical Imms Edit Patient Reports Print Record Print Confidential Record

- b. You will now see the patient information, patient notes, and patient's immunization record to date. Scroll down to the Enter New Immunization section to and proceed to enter the following immunization information:



Enter New Immunization

From IRIS Inventory ☒ Date Administered 04/06/2012 Activate Expired

Administered By Doe, John

Remove	Immunization	* Trade Name-Lot #, Exp Date	* Vaccine Eligibility	Administered By
<input type="checkbox"/>	DTP/aP	Pentacel-fdd10015 6.3.1.3-01/01	N - No Insurance	John Doe

Body Site LEFT THIGH Route INTRAMUSCULAR Dose Full Quantity on Hand: 24 VFC


New Patient Comments

Select	Date	Patient Comment
Enter New Patient Comment		
* Patient Comment		
Applies-To Date		

Save Cancel


- To add immunizations from IRIS Inventory, make sure the check box **From IRIS Inventory** is selected. This will deduct the immunization from your vaccine inventory.
- Date Administered:** Select the date the vaccine was administered by using the MM/DD/YYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field. drop-down
- Administered By:** Select who administered the vaccine from the dropdown list.
- Remove box:** Select when removing an immunization.
- Immunization:** click from the drop-down list. This will uncheck the Remove box.
- Trade Name-Lot#. Exp Date:** If using vaccine from Inventory, the trade names and lot numbers will be listed in the drop-down menu
- Vaccine Eligibility:** Select the appropriate vaccine eligibility for this patient's immunization. The vaccine eligibility drop-down list will display according to organization type.
- Administered By:** If selected above, this field will pre-populate to that selection. To change, click on the dropdown list.
- Body Site:** Select the appropriate body site for the immunization.
- Route:** Select the appropriate route for the immunization.
- Dose:** Select the appropriate dose for the immunization. The dose will default to Full.
- Repeat these steps for each new immunization you are entering.
- New Patient Comments:** If necessary, select the appropriate comment from the drop-down list. Add an "Applies-To Date" by using the MM/DD/YYYY format, or use the pop-up

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calendar by clicking the calendar icon  to the right of the field. Click the **Add** button to add patient comment to the record.

p. Click the **Save** button to save your immunization entry.


q. You should now see the immunization recorded on the patient's immunization record:

Immunization Record								
Vaccine Group	Date Admin	Series	Vaccine [Trade Name]		Dose	Owned?	Reaction	Hist? Edit
DTP/aP	04/06/2012	4 of 5	DTaP-IPV/Hib [Pentacel ®]		Full			

2. The second way to add new immunizations is by using the **Add Selected** button. At the bottom of the patient's History/Recommends page is the Vaccines Recommended by Selected Tracking Schedule. Here you can view the recommended vaccines to administer per the tracking schedule and you can select each vaccine group that you are giving. The IRIS system also allows users to enter combinations vaccines, by selecting one vaccine component of the combination vaccine. To add immunizations via the Add Selected method and to enter a combination vaccine:


- a. Click the boxes of the appropriate immunizations under the Vaccines Recommended section and click the **Add Selected** button:

Vaccines Recommended by Selected Tracking Schedule					
Select	Vaccine Group	Vaccine	Earliest Date	Recommended Date	Past Due Date
<input checked="" type="checkbox"/>	DTP/aP	DTaP, NOS	03/01/2012	03/01/2012	10/01/2012
<input type="checkbox"/>	HepA	HepA, NOS	09/01/2012	09/01/2012	04/01/2013
<input type="checkbox"/>	HepB	HepB, NOS	Immunity Recorded for Vaccine Group		
<input type="checkbox"/>	Hib	Hib, NOS	03/01/2012	03/01/2012	03/01/2012
<input type="checkbox"/>	Influenza-seasnl	Influenza, NOS	03/29/2012	03/29/2012	04/26/2012
<input type="checkbox"/>	MMR	MMR	03/29/2012	03/01/2015	03/01/2016
<input type="checkbox"/>	PneumoConiugate	PCV13	04/26/2012	05/01/2012	07/01/2012
<input type="checkbox"/>	Polio	Polio, NOS	06/29/2011	09/01/2011	10/01/2012
<input type="checkbox"/>	Varicella	Varicella	Contraindicated		

 **Add Selected**

- b. You will now see the patient information, patient notes, and patient's immunization record to date. Scroll down to the Enter New Immunization section to and proceed to enter the following immunization information:


Enter New Immunization

From IRIS Inventory ☒
Date Administered [04/06/2012](#) 
Activate Expired

Administered By Doe, John

Remove	Immunization	* Trade Name-Lot #. Exp Date	* Vaccine Eligibility	Administered By
<input type="checkbox"/>	DTP/aP	Pentacel-fdd10015 6.3.1.3-01/01	N - No Insurance	John Doe

Body Site [LEFT THIGH](#)
Route [INTRAMUSCULAR](#)
Dose [Full](#)
Quantity on Hand: 24 VFC



Save Cancel

New Patient Comments



Select	Date	Patient Comment	Delete
--------	------	-----------------	--------

Enter New Patient Comment

* Patient Comment




Applies-To Date 
Add

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- c. To add immunizations from IRIS Inventory, click the check box **From IRIS Inventory**. This will deduct the immunization from your vaccine inventory. Or leave the checkbox unselected if you are not using inventory that is tracked in IRIS.
- d. **Date Administered:** Select the date the vaccine was administered by using the MM/DD/YYYY format, or use the pop-up calendar by clicking the calendar icon  to the right of the field. drop-down
- e. **Administered By:** Select who administered the vaccine from the dropdown list.
- f. **Remove box:** Select when removing an immunization.
- g. Immunization: click from the drop-down list. This will uncheck the Remove box.
- h. **Trade Name-Lot#. Exp Date:** If using vaccine from Inventory, the trade names and lot numbers will be listed in the drop-down menu
- i. **Vaccine Eligibility:** Select the appropriate vaccine eligibility for this patient's immunization. The vaccine eligibility drop-down list will display according to organization type.
- j. **Administered By:** If selected above, this field will pre-populate to that selection. To change, click on the dropdown list.
- k. **Body Site:** Select the appropriate body site for the immunization.
- l. **Route:** Select the appropriate route for the immunization.
- m. **Dose:** Select the appropriate dose for the immunization. The dose will default to Full.
- n. **New Patient Comments:** If necessary, select the appropriate comment from the drop-down list. Add an "Applies-To Date" by using the MM/DD/YYYY format, or use the pop-up calendar by clicking the calendar icon  to the right of the field. Click the **Add** button to add patient comment to the record.
- o. **VIS Dates for New Immunizations:** This section will show all of the vaccines associated with the combination vaccine you are administering:

VIS Dates for New Immunizations		
Pentacel-fdd10015 6.3.1.3-01/01/2014-VFC		
Pentacel	DTP/aP	05/11/2009
Pentacel	Hib	12/16/1998
Pentacel	Polio	01/01/2000

- p. Click the **Save** button to save your immunization entry.
- q. You should now see the immunization recorded on the patient's immunization record:

Immunization Record							
Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist? Edit
DTP/aP	04/06/2012	4 of 5	DTaP-IPV/Hib [Pentacel ®]	Full			
Hib	04/06/2012	1 of 2	DTaP-IPV/Hib [Pentacel ®]	Full			
Polio	04/06/2012	3 of 4	DTaP-IPV/Hib [Pentacel ®]	Full			

3. Entering in historical immunization records is a slightly different process. Remember that an historical immunization is an immunization that has been administered by another organization and has not been recorded into IRIS. These immunizations will not be displayed as administered

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by your organization but rather will show your organization entered the data. An example of an historical immunization is when a patient brings you a paper record from out of state.

- a. To enter historical immunizations, click the **Add Historical Imms** button:

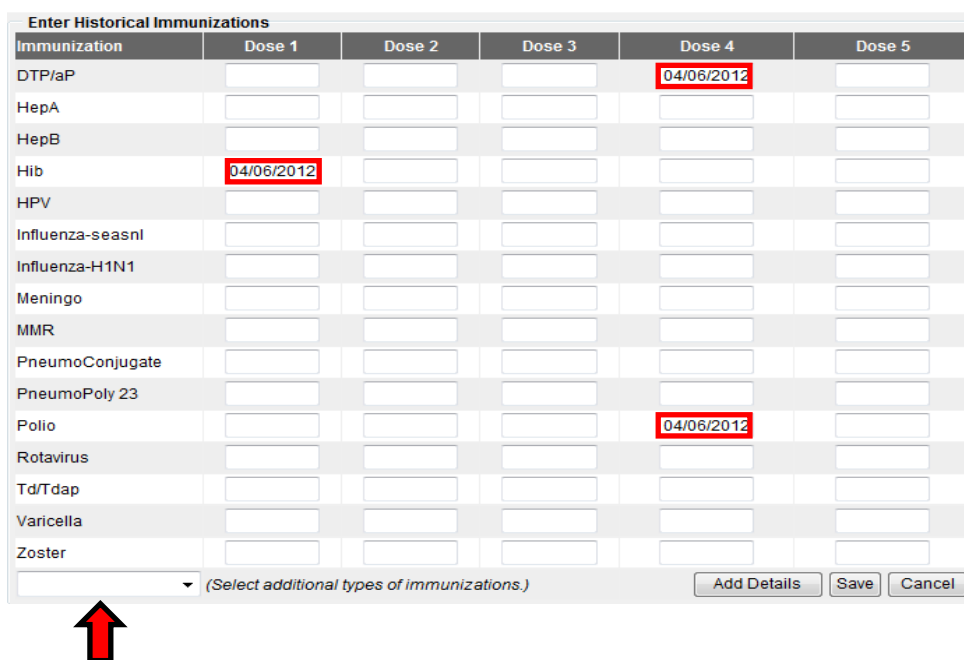


Current Age: 1 year, 1 month, 11 days

Patient Notes (2) [view or update notes](#)

Buttons: Add New Imms, **Add Historical Imms**, Edit Patient, Reports, Print Record, Print Confidential Record

- b. You will now see the patient information, patient notes, and patient's immunization record to date. Scroll down to the Enter Historical Immunization area and enter the date of the historical immunization. Click on the empty cell under the Immunization and Dose # you want to record and enter in the date when the vaccine was administered. You can enter in multiple immunizations and doses from a single screen.

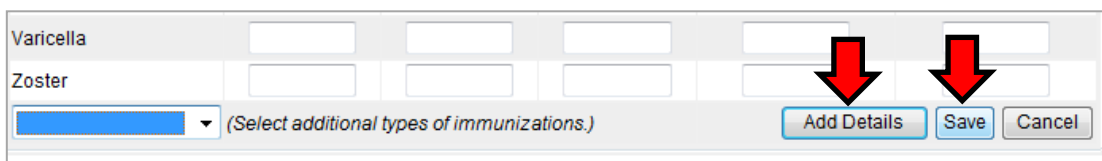


Immunization	Dose 1	Dose 2	Dose 3	Dose 4	Dose 5
DTP/aP				04/06/2012	
HepA					
HepB					
Hib	04/06/2012				
HPV					
Influenza-seasnl					
Influenza-H1N1					
Meningo					
MMR					
PneumoConjugate					
PneumoPoly 23					
Polio				04/06/2012	
Rotavirus					
Td/Tdap					
Varicella					
Zoster					

(Select additional types of immunizations.)

Buttons: Add Details, Save, Cancel

- c. If the vaccine you are entering is not listed, you do have the option of clicking the dropdown and scrolling through more vaccines to find the appropriate immunization.
- d. The vaccine date that it was administered is the only required field. If this is all the information you have, click **Save** to add the vaccine(s). However, you can click the **Add Details** button to add more information.



Varicella

Zoster

(Select additional types of immunizations.)

Buttons: Add Details, Save, Cancel


- e. On the Add Details screen, you will see the immunizations and date administered field already populate based on the information you entered. You can then add in the Trade

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Name, the Lot Number, the Provider Org, and the Source of the Imm. Once you have entered in all of the available information, click the save button.

Enter Historical Immunization Details					
Immunization	* Date Admin	Trade Name	Lot Number	Provider Org	Source of Imm
DTP/aP	04/06/2012	Pentacel	57678768	Iowa Hospital	Source Unspecified
Hib	04/06/2012	Pentacel	57678768	Iowa Hospital	Source Unspecified
Polio	04/06/2012	Pediarix	57678768	Iowa Hospital	Source Unspecified

(* required field)



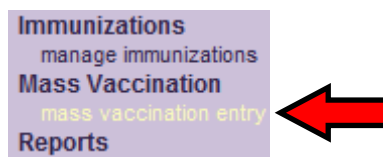
- f. You will then return to the patient's History/ Recommend page and see the Historical Immunizations that were added on the patient's immunization record section. Notice the Owned section is blank, since you entered the information, and the historical section has Yes since the vaccines were added via the Add Historical Imms Method.

Immunization Record							
Vaccine Group	Date Admin	Series	Vaccine [Trade Name]	Dose	Owned?	Reaction	Hist? Edit
DTP/aP	04/06/2012	4 of 5	DTaP, NOS [DTaP, NOS ®]				Yes 
Hib	04/06/2012	1 of 2	Hib, NOS				Yes 
Polio	04/06/2012	3 of 4	Polio, NOS				Yes 


XI. Mass Vaccination Entry

IRIS also allows a user to enter a set number of immunizations for a large number of patients using the Mass Vaccination Entry module. An example of this would be for a school based clinic. To enter immunizations for a list of patients:

1. Click **Mass Vaccination Entry** link under the Mass Vaccination section on the menu panel.



2. On the Mass Vaccination List page, the user may enter the name of a new list and click **Save** or select a previous list by clicking on the blue hyperlink and this will allow you to add patients to an existing list.

Mass Vaccination List			
	New List Name	<input type="text" value="Iowa School 2013"/>	<input type="button" value="Save"/>
Patient List			
List Name	Last Updated Date	Patient Count	Delete
ABC School April 2012	04/15/2012	2	<input type="button" value="Delete"/>
Joey Test	04/10/2012	4	<input type="button" value="Delete"/>
Luis	04/09/2012	0	<input type="button" value="Delete"/>
Nan test	04/10/2012	2	<input type="button" value="Delete"/>
Test List	04/09/2012	5	<input type="button" value="Delete"/>

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3. On the Mass Vaccination List page, the user may select an **Event Code** from the drop down menu.
4. To add immunizations from IRIS Inventory, click the check box From IRIS Inventory in the List Immunization Information section. This will deduct the immunization from your vaccine inventory.

Mass Vaccination List: Joey Test

Event Information ▲

Event Code
Event: [Dropdown Menu]

List Immunization Information ▲

From IRIS Inventory ☒ * Date Administered [Field] [Calendar Icon] Activate Expired

Administered By [Dropdown Menu]

Remove	Immunization	* Trade Name-Lot #-Exp Date	* Vaccine Eligibility	Administered By
<input checked="" type="checkbox"/>	[Dropdown Menu]	[Dropdown Menu]	[Dropdown Menu]	[Dropdown Menu]
	Body Site [Dropdown Menu]	Route [Dropdown Menu]	Dose Full	Quantity On Hand:

Add Immunization

- a. Proceed to click a date for the Date Administered field using the mm/dd/YYYY format, or use the pop-up calendar by clicking the calendar icon to the right of the field.
 - b. You may choose an Administered By value for new immunizations by clicking the drop-down list in the Enter New Immunization section. You will be able to edit these fields for each immunization on the Record Immunizations page. These fields are set up and managed by the Administrative User of IRIS for your organization.
 - c. **Remove box:** Click when removing an immunization.
 - d. **Immunization:** click from the drop-down list.
 - e. **Trade Name:** click from the drop-down list.
 - f. **Lot:** click or enter the appropriate Lot. (If using vaccine from Inventory, the trade names and lot numbers will be listed in the drop-down menu.)
 - g. **Vaccine Eligibility:** click the appropriate vaccine eligibility for this patient's immunization. The vaccine eligibility drop-down list will display according to organization type.
 - h. **Body Site:** click the appropriate body site for the immunization.
 - i. **Route:** click the appropriate route for the immunization. Please note that this will be entered in for all the patients.,
 - j. **Dose:** click the appropriate dose for the immunization. The dose will default to Full.
 - k. *Edits are in place to display a warning message if a public dose was administered to a non- eligible patient, or vice versa. User can override the warnings if the administration information is correct.*
5. Click the **Add Immunization** button. The user may add a total of 5 immunizations for each list.
 6. Once all immunization information has been entered, the user can search for patients to add to the Patient List. Enter the search criteria for the patient and click Find. If only one patient is found the patient will be added to the Patient List. If multiple patients are found, click the blue name hyperlink to view demographic information for patients. This will open in a new popup window. Click the '+' button to add the patient to the list.
 7. If you add an incorrect patient to the list, click on the checkmark box next to the patient and click on the **Remove Selected** button.
 - 8.

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Search and Add Patient to List ▲

Search to Add Patient to List
(Exact Birth Date is mandatory when searching by patient.)

Last Name Mother's First Name
 First Name Phone - -
 Middle Name
 * Birth Date

Search By Patient Id
* Patient Id

Search By IRIS ID
* IRIS ID

Search Results

Possible Matches:					
Last Name	First Name	Middle Name	Birth Date	Gender	
Patient List(4) ▲					
Patient List					
<input type="button" value="Select All"/> <input type="button" value="Immunize Selected"/> <input type="button" value="Remove Selected"/> <input type="button" value="Clear List Status"/> Page 1 of 1					
A-Z	Last Name	First Name	Middle Name	Birth Date	Status
<input type="checkbox"/>	BU	BU		03/01/2011	Immunized
<input type="checkbox"/>	SHOMMER	STANLEY	S	03/12/2011	Immunized
<input type="checkbox"/>	SHORT	SHIRLEY	STRAW	03/12/2010	Rejected Duplicate(1)

9. If you wish to immunize all of the patients on the list, you may click the **Select All** button, which will select all of the patients. Proceed to click **Immunize Selected** button to immunize the patients.
10. Notice under the **Status** section, you will see “Immunized”

XII. Manage or Create Orders


To manage or create orders, please follow these steps:

- 1) Click on the **Manage Order** link under the “Inventory” section of the Menu Panel



- 2) This will open the Orders List for your organization. You can select to show Current Orders, Historical Orders or Both Historical and Current orders by selecting the appropriate radio button. The historical section defaults to show transactions from the previous thirty days however you can change the dates to a specific date range of transactions. The Order list table shows:
 - a. The User who submitted the order.
 - b. The date the order was submitted.
 - c. The Status of the order.

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Order List		
Show: <input checked="" type="radio"/> Current <input type="radio"/> Historical <input type="radio"/> Both		
Current Orders		
User	Submit Date	Status
Lacey Dean	04/03/2012	PENDING
Dave Rider	03/31/2012	PENDING
joey zehner	03/30/2012	PENDING
Lacey Dean	03/30/2012	IN PROGRESS
Lacey Dean	03/30/2012	SENT TO DISTRIBUTOR

There are different statuses orders can have:

- i. **Pending:** Indicates the order has been created and submitted; however, the Iowa Dept of Health,(IDPH) has not yet opened the order. You may still modify the order in IRIS.
- ii. **In Progress:** Indicates the order is being filled by IDPH; you may no longer modify the order through IRIS. If you need to alter an order at this stage, call the Immunization Program at 1-800-831-6293 x 5.
- iii. **Shipped:** Indicates the order has been filled completely and has been shipped.
- iv. **Sent to Distributor:** indicates the order has been sent to the distributor.
- v. **Partial Ship:** Indicates part of the order has been shipped and the remaining items are back-ordered.
- vi. **Cancelled:** Indicates the order has been cancelled.

- 3) To order vaccines from the State, click on the **Create Order** button in the Manage Orders section.



Manage Orders
<input type="button" value="Create Order"/> <input type="button" value="Cancel"/>

- 4) You will now be able to create an order.

Create Order		
VFC PIN Z30090	Delivery Contact JESSICA SMITH	<input type="button" value="Save"/>
Initiating Organization IR Physicians	Delivery Address 321 E 12TH ST	<input type="button" value="Cancel"/>
Initiating User joey zehner	PHY	<input type="button" value="Current Inventory"/>
Org Phone (111) 111-1111	DES MOINES, IA 50319-	
Org Fax	Delivery Days/Hours M, ; M 9 TO 1	
Order Date 04/03/2012		
Order the number of doses of vaccine that are needed. Allow approximately 2 weeks for delivery. Special Instructions for Order Enter Text: 150 character maximum. <div style="border: 1px solid black; padding: 2px;"> Ordered over the recommended quantity for Influenza because of high demand. </div>		

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- 5) In the Create Order section, you will see your organization's information along with your name as you are creating the order. You will also see the delivery contact information and a free text area in which you can type in special instructions or comments for orders.
- 6) Below the Create Order section, you will see a list of vaccines. This is a complete list of Orderable VFC Vaccines from the state. The list is organized by:

Orderable Vaccines							
Vaccine Group	Trade Name	Packaging	NDC Number	Doses Admin (EOQ)	Doses on Hand	Recommended Order Qty	Doses Ordered
DTAP	DAPTACEL	DAPTACEL 10X1 DOSE VIAL	49281-0286-10	1	215	<input type="text" value="0"/>	<input type="text"/>
DTAP	DECAVAC	10X1 DOSE SYR-PEDS	49281-0291-10	0	0	<input type="text" value="0"/>	<input type="text"/>
DTAP	DECAVAC	10-PACK 1-DOSE VIALS	49281-0291-83	2	0	<input type="text" value="10"/>	<input type="text"/>

- a. Vaccine Group,
- b. Trade Name
- c. Packaging for the Vaccine
- d. NDC number
- e. Doses Administered
- f. Doses on Hand
- g. Recommended Order Qty
- h. Doses Ordered



Note: As you are creating your order, you can also view your organization's current inventory. You can do this by clicking on the Current Inventory button in the Create Order section. This will open in a new window. As you are creating an order, you can toggle back and forth in between the current inventory and the doses you are ordering.



- 7) After you have entered in the correct amount of doses ordered, click on the Save button.

VFC PIN Z90090

Initiating Organization IR Physicians

Initiating User joey zehner

Org Phone (111) 111-1111

Org Fax

Order Date 04/03/2012

Delivery Contact JESSICA SMITH

Delivery Address 321 E 12TH ST
PHY
DES MOINES, IA 50319-

Delivery Days/Hours M, ; M 9 TO 1

Order the number of doses of vaccine that are needed.

Allow approximately 2 weeks for delivery.

Special Instructions for Order

Enter Text: 150 character maximum.

Ordered over the recommended quantity for Influenza because of high demand.

Historical Notes

Created by	Create Date	Note

Orderable Vaccines

Vaccine Group	Trade Name	Packaging	NDC Number	Doses Admin (EOQ)	Doses on Hand	Recommended Order Qty	Doses Ordered
DTAP	DECAVAC	10X1 DOSE SYR-PEDS	49281-0291-10	0	0	<input type="text" value="0"/>	<input type="text"/>
DTAP	DECAVAC	10-PACK 1-DOSE VIALS	49281-0291-83	2	0	<input type="text" value="10"/>	<input type="text" value="10"/>

IRIS Training Handout

- 8) Once saved the order will display on the top of the Current Order list. If it is still listed as Pending, then the order can still be edited. To edit the order, click on the Pending link.

Order List			Show: <input checked="" type="radio"/> Current <input type="radio"/> Historical <input type="radio"/> Both
Current Orders			
User	Submit Date	Status	
Lacey Dean	04/03/2012	PENDING	
Dave Rider	03/31/2012	PENDING	
joey zehner	03/30/2012	PENDING	
Lacey Dean	03/30/2012	IN PROGRESS	
Lacey Dean	03/30/2012	SENT TO DISTRIBUTOR	

- 9) This will open the **Modify Order** screen for that order. You can remove any of the vaccines you have included in the order as well as add new vaccines to the order. To save your updates, click on the **Submit Updates** button. To delete the Order, click on the **Delete Order** button. To cancel and go back, click the **Cancel** button.

VFC PIN Z90090

Initiating Organization IR Physicians

Initiating User joey zehner

Org Phone (111) 111-1111

Org Fax

Order Date 04/03/2012

Delivery Contact JESSICA SMITH

Delivery Address 321 E 12TH ST
PHY
DES MOINES, IA 50319-

Delivery Days/Hours M, : M 9 TO 1

Submit Updates

Delete Order

Cancel

Current Inventory

Order the number of doses of vaccine that are needed.
Allow approximately 2 weeks for delivery.

Special Instructions for Order
Enter Text: 150 character maximum.

Historical Notes


Created by	Create Date	Note
------------	-------------	------

Vaccines Ordered

Remove	Vaccine	Trade Name	Packaging Description	NDC	Doses on Hand	Doses Admin	Rec Order Qty	Qty Ordered
<input type="checkbox"/>	Td Pres-Free	DECAVAC	10-PACK 1-DOSE VIALS	49281-0291-83	0	2	10	10

Orderable Vaccines

Vaccine Group	Trade Name	Packaging	NDC Number	Doses Admin (EOQ)	Doses on Hand	Recommended Order Qty	Doses Ordered
ADEN	Adeno T4	Kellys test	12345-6789-01	0	0	<input type="text" value="0"/>	<input type="text" value="0"/>
ADEN	Adeno T4	10 pack - 1 dose vials test	94874-4465-01	1	56	<input type="text" value="0"/>	<input type="text" value="0"/>

Note: Always remember that there are multiple tools to help you through this process. The IRIS user manual, Online Help (Light bulb ) , and the IRIS help desk can assist with Inventory information for your organization.

IRIS Training Handout

XIII. Patient Specific Reports

For all patients in IRIS, you may generate the following reports from the Patient Reports Screen:

- Immunization History Report
- Immunizations Needed
- Provisional Certificate of Immunization
- Certificate of Immunization
- Master Index Card
- Patient Reminder Letter

Immunization History Report

The Immunization History Report displays demographics, contact information, and a detailed summary of the patient's immunization history. This report should be provided to parents and guardians, as requested. To generate the report, follow these steps:

14 February 2012		Iowa Immunization Registry Information System									
		IR Physicians									
		Immunization History Report									
Patient ID:		Tracking Schedule: ACIP									
Patient Name: JOE JONES											
Birth Date: 01/01/2010		Gender: Male									
Age: 2 years, 1 month, 13 days											
Immun	Date Admin	Series	Vaccine [Trade Name]	Dose	Mfg Code	Lot #	Bod Rt.	Bod St.	Provider of Information	React	
DTP/aP	03/20/2010	1 of 5	DTaP-IPV/Hib [Pentacel®]	Full	PMC	FDD10015 6.3.1.1			IR Physicians		
DTP/aP	05/25/2010	2 of 5	DTaP, NOS [DTaP, NOS®]	Full					IR Physicians		
HepB	01/02/2010	1 of 3	HepB-Peds [Engerix-B Peds®]	Full					IR Physicians		
HepB	05/25/2010	2 of 3	HepB, NOS [HepB®]	Full					IR Physicians		
Hib	03/20/2010	1 of 2	DTaP-IPV/Hib [Pentacel®]	Full	PMC	FDD10015 6.3.1.1			IR Physicians		
MMR	05/20/2011	1 of 2	MMR [MMR II®]	Full		5679	ID	LD	IR Physicians		
PneumoConj ugate	03/20/2010	1 of 3	PCV7 [Prevna7®]	Full					IR Physicians		
PneumoConj ugate	05/25/2010	2 of 3	PCV7 [Prevna7®]	Full					IR Physicians		
Polio	03/20/2010	1 of 4	DTaP-IPV/Hib [Pentacel®]	Full	PMC	FDD10015 6.3.1.1			IR Physicians		
Polio	05/25/2010	2 of 4	Polio, NOS	Full					IR Physicians		

1. From a patient's Manage Patient screen or Manage Immunizations screen, click the **Reports** button.
2. At the Reports Available for this Patient section, click **Immunization History Report**, this is a hyperlink.
3. Once the report is generated, it will be displayed using Adobe Acrobat Reader®.
4. To print the report, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.
5. To return to the Patient Reports screen, you may close the Acrobat Reader® by clicking the X button in the upper right corner of the Immunization History Report window.

IRIS Training Handout

Immunizations Needed Report

The Immunizations Needed report displays demographics, contact information, immunization record, and immunizations recommended by date according to the tracking schedule assigned to the patient. This report can be provided to parents and guardians for their records and helps to identify upcoming immunizations for their children. In addition, it provides a place for the next appointment date and organization phone number. To generate the report, follow these steps:

14 February 2012

ALERT Immunization Information System

Page 1 of 1

Immunization Record

Patient ID: _____ Race: _____ Tracking Schedule ACIP

Patient Name (L.F.M): JONES, JOE Ethnicity:

Birth Date: 01/01/2010 Gender: Male

Age: 2 years 1 months 13 days

Patient Comments: From Date: To Date:

Immunity: varicella (chicken pox) 10/18/2011

Immunization Record

Immunization	Date Admin	Series	Vaccine [Trade Name]	Dose	Reaction
DTP/aP	03/20/2010	1 of 5	DTaP-IPV/Hib [DTP/aP]		
	05/25/2010	2 of 5	DTaP, NOS [DTP/aP]		
HepB	01/02/2010	1 of 3	HepB-Peds [HepB]		
	05/25/2010	2 of 3	HepB, NOS [HepB]		
Hib	03/20/2010	1 of 2	DTaP-IPV/Hib [Hib]		
MMR	05/20/2011	1 of 2	MMR [MMR]		
PneumoConjugat	03/20/2010	1 of 3	PCV7 [PneumoConjugate]		
	05/25/2010	2 of 3	PCV7 [PneumoConjugate]		
Polio	03/20/2010	1 of 4	DTaP-IPV/Hib [Polio]		
	05/25/2010	2 of 4	Polio, NOS		
Rotavirus	05/25/2010	1 of 3	Rotavirus, NOS		

Immunizations Due

Vaccine	Date Needed
Varicella	Immune
Rotavirus, NOS	Max Age Exceeded
DTaP, NOS	07/25/2010
HepB, NOS	07/25/2010
Polio, NOS	07/25/2010
HepA, NOS	01/01/2011
PCV13	01/01/2011
Hib, NOS	04/01/2011
Influenza, NOS	08/01/2011
MMR	01/01/2014

Appointment: ____/____/____

Provider Phone Number: _____

1. From a patient's Manage Patient screen or Manage Immunizations screen, click **Reports**.
2. At the Reports Available for this Patient section, click **Immunizations Needed**, which is a hyperlink.
3. Once the report is generated, it will be displayed using Adobe Acrobat Reader®.
4. To print the report, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.
5. To return to the Patient Reports screen, you may close the Acrobat Reader® by clicking the X button in the upper right corner of the Immunization History Report window.

IRIS Training Handout

Provisional Certificate of Immunization

This certificate is the official Provisional Certificate of Immunization to be used when a child has begun but not completed the vaccines required for entry into licensed child care and school in the state of Iowa.

Iowa Department of Public Health Provisional Certificate of Immunization			
This applicant shall submit this certificate to the admitting official of the school or child care center. A copy of this certificate should be provided to the applicant, parent, or guardian.			
Name Last: BAVER	First: BRITTANY	Middle: WANDA	Date of Birth: 01/30/2010
<p>This applicant qualifies for a provisional enrollment for one of the following reasons (select one):</p> <p><input type="checkbox"/> Has received at least one dose of each of the required vaccines but has not completed all the required immunizations or;</p> <p><input type="checkbox"/> Is a transfer student from another school system. (A transfer student is an applicant seeking enrollment from one U.S. domestic elementary or secondary school to another)</p> <p>The amount of time allowed for provisional enrollment shall be as rapidly as medically feasible but shall not exceed 60 calendar days. The period of provisional enrollment shall begin on the date the certificate is signed. To be valid, the certificate shall be completed in its entirety including an expiration date and list of remaining vaccines required to qualify for a Certificate of Immunization.</p> <p>Certificate Expiration Date: _____</p> <p>Remaining vaccine(s) required: _____</p> <p>I certify that the above named applicant is hereby issued a Provisional Certificate of Immunization and I have informed the applicant, parent, or guardian of the provisional enrollment requirements.</p> <p>Signature: _____</p> <p>Physician (MD or DO), Physician Assistant, Nurse, or Certified Medical Assistant</p> <p>Date: 03/06/2012</p>			
Record of Immunization			
	Vaccine	Date Given	Doctor / Clinic / Source
Diphtheria, Tetanus, Pertussis DTaP/DTP/DT/ Td/Tdap	1		
	2		
	3		
	4		
	5		
Polio IPV/OPV	1 Polio-Inject	04/06/2010	IR Physicians
	2 Polio-Inject	07/06/2010	IR Physicians
	3 Polio-Inject	01/05/2011	IR Physicians
	4		
Measles, Mumps, Rubella MMR	1 MMR	03/15/2011	IR Physicians
	2 MMR	05/10/2011	IR Physicians
Haemophilus influenzae type b Hib	1 Hib-OMP	04/12/2010	IR Physicians
	2 Hib-OMP	05/03/2010	IR Physicians
	3 Hib-OMP	07/06/2010	IR Physicians
	4 Hib-OMP	02/11/2011	IR Physicians
Hepatitis B IPV/OPV	1 HepB-Peds	04/13/2010	IR Physicians
	2 HepB-Peds	06/10/2010	IR Physicians
	3 HepB-Peds	08/23/2010	IR Physicians
Varicella (If applicant has a history of natural disease write "Immune to Varicella")	1 Varicella	05/30/2011	IR Physicians
	2		
Pneumococcal PCV/PPV	1		
	2		
	3		
	4		

Revision Date: June, 2012

Certificate of Immunization

This certificate is the official Certificate of Immunization required for children entering licensed child care and school in the state of Iowa

Iowa Department of Public Health Certificate of Immunization			
Name Last: BAVER	First: BRITTANY	Middle: WANDA	Date of Birth: 01/30/2010
Parent/Guardian: _____		Address: 447 PICKNEY ROCK RAPIDS, IA 50158	
I certify that the above named applicant has a record of age-appropriate immunizations that meet the requirement for licensed child care or school enrollment.		Phone: _____	
Signature: _____		Date: _____	
Physician, Physician Assistant, Nurse, or Certified Medical Assistant			
A copy of this certificate may be reviewed by the local Board of Health or Iowa Department of Public Health may review this certificate for survey purposes.			
Diphtheria, Tetanus, Pertussis DTaP/DTP/DT/ Td/Tdap	Vaccine	Date Given	Doctor / Clinic / Source
Polio IPV/OPV	Polio-Inject	04/06/2010	IR Physicians
	Polio-Inject	07/06/2010	IR Physicians
	Polio-Inject	01/05/2011	IR Physicians
Measles, Mumps, Rubella MMR	MMR	03/15/2011	IR Physicians
	MMR	05/10/2011	IR Physicians
Haemophilus influenzae type b Hib	Hib-OMP	04/12/2010	IR Physicians
	Hib-OMP	05/03/2010	IR Physicians
	Hib-OMP	07/06/2010	IR Physicians
	Hib-OMP	02/11/2011	IR Physicians
Hepatitis B	HepB-Peds	04/13/2010	IR Physicians
	HepB-Peds	06/10/2010	IR Physicians
	HepB-Peds	08/23/2010	IR Physicians
Varicella Chicken Pox (If applicant has a history of natural disease write "Immune to Varicella")	Varicella	05/30/2011	IR Physicians
Pneumococcal PCV/PPV			
Meningococcal MCV4/MPSV4			
Hepatitis A			
Rotavirus			IR Physicians
			IR Physicians
Human Papilloma Virus HPV			
Other			

03/06/2012 Page 1 of 2 Revision Date: June 2012

IRIS Training Handout

Master Index Card

This is an internal document for health care providers in Iowa to maintain a patient's immunizations. It is **not** an official Certificate of Immunization.

Iowa Department of Public Health - Bureau of Disease Prevention and Immunization Master Index Card

Patient's Name: BAYER, BRITTANY WANDA S.S. #: _____ Date of Birth: 01/30/2010 Gender: F
 Parent/Guardian: _____ Home Ph: _____ Birth State/Country: _____
 Address: 447 PICKNEY ROCK RAPIDS, IA 50258 Work Ph: _____ Mother's Maiden Name: BRINDEL
 Ethnicity: _____ Medicaid #: _____ Mother's S.S. #: _____
 Race: () American Indian/Alaska Native () Asian () Black () Native Hawaiian or Other Pacific Islander () White Physician: _____
 Medical Notes/Allergies: _____

This child qualifies for the VFC program because he/she is (select only one): () MI-Medicaid Enrolled () NI-Has No Insurance () AIAN-Am. Indian/Alaska Native () UI-Underinsured

*I have read and understand the appropriate Vaccine Information Statement(s). I have had a chance to ask questions which were answered to my satisfaction. I understand the benefits and risks of the vaccine(s).

Vaccine	Date Given	Client / Parent / Guardian Signature *	Health Care Provider	Dosage / Route / Site	Manufacturer / Lot #	VIS Form & Date
Diphtheria, Tetanus, Pertussis DTaP/Tdap/DT/PT/Td						
Polio IPV/OPV						
Polio-Inject	04/26/2010			1		
Polio-Inject	07/06/2010			1		
Polio-Inject	01/05/2011			1		
Measles, Mumps, Rubella MMR						
MMR	03/15/2011			1		
MMR	05/10/2011			1		
Haemophilus influenzae type b Hib						
Hib-CMP	04/13/2010			1		
Hib-CMP	05/23/2010			1		
Hib-CMP	07/26/2010			1		
Hib-CMP	02/11/2011			1		
Hepatitis B						
HepB-Peds	04/13/2010			1		
HepB-Peds	06/10/2010			1		
HepB-Peds	06/23/2010			1		

IRIS Training Handout

Patient Reminder Letter

The Patient Reminder Letter link will print an individual patient's reminder letter, which includes the patient vaccination record and the recommended vaccines to be received. This report generates in PDF format, which can then be printed for the specific patient.

Dear Parent/Guardian of Brittany Wanda Bayer,

Our records indicate that Brittany Wanda Bayer, has received the following immunizations:

Immunization Record		Tracking Schedule	ACIP
Immunization	Date Administered	Series	
HepB	04/13/2010	1 of 3	
	06/10/2010	2 of 3	
	08/23/2010	3 of 3	
Hib	04/12/2010	1 of 4	
	05/23/2010	2 of 4	
	07/26/2010	3 of 4	
MMR	02/11/2011	4 of 4	
	03/15/2011	1 of 2	
	05/10/2011	2 of 2	
Polio	04/26/2010	1 of 4	
	07/06/2010	2 of 4	
	01/05/2011	3 of 4	
Varicella	05/30/2011	Not Valid	

Our records also show that Brittany may be due for the following immunizations. If Brittany received these or other immunizations from another health care provider, please call our office so that we can update Brittany's record. Otherwise please take Brittany to a health care provider to receive them.

Immunizations Due
DTaP, NOS
HepA, NOS
Varicella
Influenza, NOS
PCV13

XIV. Organization Level Reports

These are specific reports to assist the organization with viewing the information regarding patients and immunizations in multiple ways.

Reminder/Recall

From the Reports menu option, you may generate reminder and recall notices, which include letters, mailing labels, reminder cards and patient listings.

IRIS Training Handout



Note: Generation of reminder and recall notices

Reminder and recall notices can be generated for each patient, if the following conditions are met:

- The status is Active in the Patient Information Section for your organization.
- The Allow Reminder and Recall Contact? indicator in the Patient Information Section is Yes.
- The patient has complete address information listed in the Address Information Section.



Reminder Request Status screen

Depending upon the number of patients associated with your provider organization, it may take five minutes or more to generate the data for the various reports. While the data is being generated, the Reminder Request Status screen indicates the percentage of completion. Periodically click on Refresh to update the status.



Note: Once you reach the Reminder Request Status screen, it is not necessary to stay at this screen while your report is being created. You may go anywhere in IRIS while the report is generating and may return to the status screen by clicking on the Check Reminder Status link under Reports on the menu panel. Likewise, you may close out of IRIS and return to the status screen by clicking on the Check Reminder Status link after logging in again.



Summary Screen

When the report is complete, you may click on the blue date hyperlink to go to the Reminder Request Process Summary screen. The Summary screen lists the number of patients involved in the search and the criteria that were used to define the search. From the Summary screen, you may create various reminder output options.

Reminder Request Process Summary		
Reminder Request Criteria Name:		
Step	Criteria Evaluated at this Step	Patients
1	Patients associated with <i>IR Physicians</i> .	39
2	Patients immunized by <i>IR Physicians</i> .	30
3	Patients that are active within <i>IR Physicians</i> and allow Reminder & Recall Contact . Additional criteria includes: <ul style="list-style-type: none">• Patients born between 01/01/2007 and 01/01/2010;• County is not specified;• School is not specified;• Provider is not specified;	17
4	Patients that have a Valid Address . Additional criteria includes: <ul style="list-style-type: none">• City is not specified• Zip Code is not specified.	10
5	Patients that meet the following criteria regarding vaccination status: <ul style="list-style-type: none">• Patients that are Due Now for one or more vaccinations on or before ;• Use all vaccine groups;• Use tracking schedule associated with each patient..	5
Total Number of Patients Eligible for Reminder		5

IRIS Training Handout

Last Notice Date Options

On the bottom of the Reminder Request Process Summary screen, you have the option of resetting the last notice date, which will affect future reminder/recall notices generated using this information. Your options on the last notice date table include:

Last Notice Date Options	
<i>Preview Patients that will display on the Reminder Recall Report.</i>	<input type="button" value="Preview Patients"/>
<i>Increment last notice date for all patients eligible for this reminder.</i>	<input type="button" value="Increment Eligible"/>
<i>Increment last notice date for all patients immunized by IR Physicians.</i>	<input type="button" value="Increment Immunized"/>
<i>Return to the previous screen.</i>	<input type="button" value="Cancel"/>

1. Clicking **Preview Patients** will provide a list of patients included in the Reminder Recall Report. This information is presented on the screen and includes a hyperlink to each patient's demographic record.
2. Clicking **Increment Eligible** will reset the last notice date for all patients eligible for this reminder. The last notice date is viewable on the patient's demographic record under the organization information section.
3. Increment last notice date for all patients immunized by your organization.
4. Click **Cancel** to return to the Reminder Request Status screen.

Reminder/Recall Output Options

The Reminder Request Output Options table, found on the Reminder Request Process Summary screen, allows you to choose how you would like to use the data from your query.

Reminder Letters

The letter output option allows you to generate a standard form letter for the parent/guardian for each patient returned on your query. The letter allows room at the top for your organization's letterhead. The body of the letter includes the patient's immunization history, recommended immunizations and due dates. There are up to two lines for free text and/or a telephone number. To generate Reminder Letters:

1. Under the Additional Input column or the Letter section of the table, you have the option of entering:

Output	Description	Additional Input
Reminder Letter	Standard Reminder Letter.	<div>Report Name <input type="text"/></div> <div>Free Text <input type="text"/></div> <div>Phone # <input type="text"/></div>

- a. If a Report Name is not indicated, the report will simply be named Reminder Letter on the Reminder Report Status screen.
- b. You may include a maximum of 400 characters in additional information in the Free Text field. Any information entered in this text box will be presented as the closing for each of the letters generated in your report.

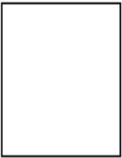
IRIS Training Handout

- c. The telephone number is presented in the closing for each of the letters generated in your report.
2. Click **Reminder Letter**, which is a hyperlink.
3. Your report will be listed on the Reminder Request Status screen. The bottom table shows the name of the request, the date and time it was started and the status of the request.
 - a. You have the option of moving to other portions of IRIS or using other functions of your computer while you are waiting for your letters to process. To return to check the progress of your request, click on Check Reminder Status under Reports on the menu panel.
 - b. If you choose to stay at the Reminder Request Status screen while your request is processing, click on Refresh occasionally to check the status.
4. Once the status displays as Ready and the report name becomes a hyperlink, your letters are ready to be viewed. Click the report name to view or print the letters in Adobe Reader®.
5. To print the letters, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.
6. To print additional output, click the Back button on your browser. At the Reminder Request Status screen, click on the Reminder Request hyperlink (top table) to return to the Reminder Request Process Summary screen.

Reminder Card

The Reminder Card output option allows you to generate a standard reminder card for the parent/guardian for each patient returned on your query. The output will generate in a format that allows 4 cards per page. To generate Reminder Cards, follow these steps:

- Under the Additional Input column or the Letter section of the table, you have the option of entering the following information:
 - If a Report Name is not indicated, the report will simply be named Reminder Card on the Reminder Report Status screen
 - The telephone number and organization are printed for each of the cards generated in your report.
 - Free text lines are not being used by IRIS as there is a specified format for the cards. Also note the cards do not display specific immunization/s needed information.
 -

04/18/2012	IR Physicians 321 E 12TH ST PHY DES MOINES, IA 50319		04/18/2012
The person listed below is due for an immunization: Li Test One Test			The person listed below is due for an immunization: Li Test One Test
You can contact us at: (111) 111-1111			You can contact us at: (111) 111-1111

IRIS Training Handout

Mailing Labels

The labels output option produces 30 labels per page on Avery Mailing Labels #5160. To generate mailing labels, follow these steps:

Mailing Labels	Avery Mailing Labels.	Report Name <input type="text"/>
--------------------------------	-----------------------	----------------------------------

1. Click **Mailing Labels**, which is a hyperlink. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.
2. You have the option of moving to other portions of IRIS or using other functions of your computer while you are waiting for your labels to process. To return to check the progress of your request, click **Check Reminder Status** under Reports on the menu panel.
3. If you choose to stay at the Reminder Request Status screen while your request is processing, click **Refresh** periodically to check the status.
 - a. Once the report name becomes a hyperlink, your labels are ready. Click the report name to view or print the labels in Adobe Reader®.
 - b. To print the labels, click on the printer icon on the Adobe® toolbar. Click **OK** in the Print dialog box.
4. To print additional output, click the Back button on your browser. At the Reminder Request Status screen, click on the Reminder Request hyperlink (top table) to return to the Reminder Request Process Summary screen.

Patient Query Listing

The Patient Query Listing displays contact information for those patients identified as being due/overdue in the Reminder/Recall output in a report format. This report lists every patient that was returned in the report query process. To generate a Patient Query Listing:

1. Click the **Patient Query Listing** hyperlink.
2. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started and the status of the request.
 - a. You have the option of moving to other portions of IRIS or using other functions of your computer while you are waiting for your report to process. To return to check the progress of your request, click on Check Reminder Status under Reports on the menu panel.
 - b. If you choose to stay at the Reminder Request Status screen while your request is processing, click on Refresh occasionally to check the status.
3. Once the report name becomes a hyperlink, your report is ready. Click the report name to view or print the report in Adobe Reader®.
4. To print the report, click the printer icon on the Adobe® toolbar. Click **OK** in the Print dialog box.
5. To print additional output, click the Back button on your browser. At the Reminder Request Status screen, click on the Reminder Request hyperlink (top table) to return to the Reminder Request Process Summary screen.

IRIS Training Handout

Provider Location	
Organization Name	IR Physicians
Personal Information	
* Last Name	
* First Name	
Middle Name	
Suffix	
* Birth Date	
* Mother's Maiden Last	
* Mother's First Name	
Street Address	
Other Address	
City	
State	OR
Zip	
County	
Phone Number	
* Gender	Unknown
SSN	
Medicaid ID	
Patient ID	

Save

Add Next

Add New Imm

Add Historical Imm

Cancel

Extract Client Data

The Extract Client Data displays patient demographic information, immunization history, and recommendations for those patients identified as being due/overdue in the Reminder/Recall output in XML format. This report lists every patient that was returned in the report query process. To extract client data in XML format:

1. Click the **Extract Client Data** hyperlink.
2. Your request will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started, and the status of the request.

Reminder Request Status					
Started	Completed	Status	Patients	Target From	Target To
08/01/2011 05:58 AM	08/01/2011 06:01 AM	100 %	10	08/01/2011	08/01/2011
07/29/2011 07:11 AM	07/29/2011 07:12 AM	100 %	10	07/29/2011	07/29/2011
07/29/2011 07:06 AM	07/29/2011 07:07 AM	100 %	2	07/29/2011	07/29/2011
07/29/2011 07:06 AM	07/29/2011 07:07 AM	100 %	2		

Reminder Output Status					
Name	Type	Requested	Started	Completed	Status
Client XML	Client XML	08/01/2011 06:24 AM	08/01/2011 06:24 AM	08/01/2011 06:24 AM	Ready
Reminder Letter	Reminder Letter	08/01/2011 06:01 AM	08/01/2011 06:01 AM	08/01/2011 06:01 AM	Ready

IRIS Training Handout

Creating Custom Letters

In addition to the standard letter, IRIS allows users to create and store up to three custom letters to be used for reminder/recall. To create a new custom letter, follow these steps:

1. Click **Manage Custom Letter** under Reports on the menu panel.

Manage custom letters

Long Test Nov 18 2010	Delete
Long Test Oct 29 2010	Delete
New Custom Letter	

2. Click the **New Custom Letter** hyperlink.
3. At the Create New Custom Letter screen, enter the following:
 - a. Top Margin: Choose the number of blank lines you would like at the top of the letter from the drop down list provided. These blank spaces will leave room to print the letters on your office letterhead.
 - b. Include Patient Address:
 - i. Check the box to include the patient's address at the top of the letter.
 - c. To include a name with the patient address, choose from the drop down list one of the following:
 - i. (no name) - default
 - i. Patient name
 - ii. To the parent/guardian of patient name
 - b. Salutation: Enter a greeting, and then choose a name option from the drop down list provided.
 - i. If name is chosen, the name of the patient will show up after the salutation.
 - ii. If responsible person is chosen, the letter will read <salutation> Parent/Guardian of <patient name>

4. Paragraph 1:

- a. In the field marked First Part, enter desired text.
- b. If you do not wish to include a name, you may enter all of the first paragraph text in the field marked First Part and select no name from the name drop down list.

IRIS Training Handout

- c. If you wish to include a name within the paragraph, enter text up to the mention of the name ending with a single space. Next, choose the name you would like to appear within the paragraph from the drop down list (either parent/guardian, patient name or no name).
 - d. In the field marked Second Part, continue to enter the rest of the text.
 - e. Immunization History: Check the box to include the patient's immunization history in the letter.
 - f. The maximum amount of allowed characters in this field is 4,000.
- 5. Paragraph 2: You may enter more text in this field.
 - a. Immunization recommendations: Check this box to include the immunization forecast for the patient in the letter.
 - b. The maximum amount of allowed characters in this field is 4,000.
- 6. Paragraph 3: You may enter text in this field.
 - a. Closing: Enter a closing word or statement in this field. If you wish to include your provider, organization's name and/or telephone number after the closing, check the appropriate boxes.
 - b. Name and Save the Custom Letter: Enter a name for the letter in the field provided. When the letter is complete, click on Save.
 - c. The maximum amount of allowed characters in this field is 4,000.

Top Margin
Number of blank lines at the top of the letter: 3
Patient Address
<input type="checkbox"/> Include patient address
Salutation
Enter a salutation for the letter:
Include a name at the end of the salutation: (no name)
Paragraph 1
First Part
Include a name between the first and second parts of this paragraph: (no name)
Second Part
Immunization History
<input type="checkbox"/> Include immunization history
Paragraph 2
Immunization Recommendations
<input type="checkbox"/> Include immunization recommendations
Paragraph 3
Closing
Enter a closing for the letter:
<input type="checkbox"/> Include provider organization name in the closing
<input type="checkbox"/> Include provider organization phone number in the closing
Name and save the custom letter
Name the custom letter:
<input type="button" value="Save"/> <input type="button" value="Cancel"/>

IRIS Training Handout



Note: Once you have saved the custom letter, click on check reminder status in the left hand menu bar. Then select the reminder report you want to use to generate your custom letter.



Generating Custom Letters

The custom letter output option allows you to generate a customized letter for each patient returned on your query. To create a new custom letter, refer to the Creating Custom Letters section of this chapter. To generate a custom letter from the Reminder Request Process Summary screen:

1. Every time you generate a custom letter, you will want to give the report a unique name. This name is different from the custom letter name. You will want to name the report prior to clicking on the custom letter hyperlink.
2. Click the link with the name of the custom letter. The letter will begin generating immediately.

Patient Query Listing	A list of patients based on the report criteria.	Report Name <input type="text"/>
Extract Client Data	Extract client data in XML format.	Report Name <input type="text"/>
Long Test Nov 18 2010	Custom Letter.	Report Name <input type="text"/>
Long Test Oct 29 2010	Custom Letter.	Report Name <input type="text"/>

3. Your report will be listed on the Reminder Request Status screen; the bottom table shows the name of the request, the date and time it was started and the status of the request.
 - a. You have the option of moving to other portions of IRIS or using other functions of your computer while you are waiting for your letters to process. To return to check the progress of your request, click on Check Reminder Status under Reports on the menu panel.
 - b. If you choose to stay at the Reminder Request Status screen while your request is processing, click on Refresh occasionally to check the status.
4. Once the report name becomes a hyperlink, your letters are ready. Click on the report name to view or print the letters in Adobe Reader®.
5. To print the letters, click on the printer icon on the Adobe® toolbar. Click on OK in the Print dialog box.
6. To print additional output, click on the back button on your browser. At the Reminder Request Status screen, click on the reminder request hyperlink (top table) to return to the Reminder Request Process Summary screen,

Doses Administered Report

The Doses Administered Report will give you information on how many doses of each vaccine have been given, by age, within a specified date range. This report includes administered immunization records from IRIS Inventory (historical immunizations are not included). In the next release, this report will be modified to display all doses administered, not just doses from inventory.

IRIS Training Handout

Doses Administered Report from IRIS Inventory																
Vaccination Period 01/01/2012 To 03/31/2012																
Report Run on: 03/31/2012																
Site: IR Physicians																
Group Name	Trade Name	VFC	<1 yr	1 yr	2 yrs	3-5 yrs	6 yrs	7-10 yrs	11-12 yrs	13-18 yrs	19-24 yrs	25-44 yrs	45-64 yrs	65+ yrs	Total	
Td/Tdap	Td	Yes	0	0	0	0	0	0	1	1	0	1	0	0	3	
Td/Tdap	DECAVAC	Yes	0	0	0	0	0	0	0	0	0	0	2	0	2	

Follow these steps to generate a Doses Administered report for your organization:

1. Click the **Doses Administered** menu item under the Inventory section of the menu panel.
2. At the Doses Administered Report Criteria page, choose your organization from the Site drop down list.
3. In the "From" field under Report Date Range, choose a starting and ending date for your report using the MM/DD/YYYY format.
4. Click the Generate Report button.
5. The report displays in Adobe Acrobat Reader®. Click the printer icon on the Adobe® toolbar to print the report.
6. Click the **OK** button in the Print dialog box.
7. Click your browser's Back button to return to the Doses Administered Report criteria.

Benchmark Reports

Benchmark reports allow IRIS users to retrieve a list and count of patients who have met an immunization benchmark or predefined series of benchmarks. The resulting report may be viewed in IRIS, exported as a text file, exported as a spreadsheet, or exported as a PDF file.

<p style="text-align: center;">Iowa Immunization Registry Information System Report generated on 04/18/2012 Report generated by Joseph Zehner IR Physicians - IRPH - Z90090</p> <p>Filter conditions used for this report: Patients Associated with Provider: IR Physicians Patients who did NOT meet the selected benchmark(s) Just consider immunizations as meeting the benchmark Patients of gender: Male Age less than or equal to 72 months Evaluation date: 04/18/2012 Benchmark age @ 3 months Selected benchmarks: HepB (1)</p> <p>Total patients: 45; 0 patients (0%) met all benchmark criteria, 45 patients did not Number of rows in this report: 45</p>									
No	First Name	Last Name	Birth Date	Primary Phone Number	Street	City	State	Zipcode	HepB (1)
1	MALE	AWESOME	10/29/2009				OR		N
2	AUSTIN	BLANKENSHIP	12/07/2011		16 LOWE	DUBUQUE	IA	52001	N

To generate a Benchmark report:

1. Click **Benchmark Report** under the Reports section of the menu panel.
2. Select the patient population to be assessed by clicking on one of the following:

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- a. Patients Associated with Selected Site: immunization data on all patients associated with the site selected from the drop down list at the right. Patients Associated with <Organization Name> OR Patients Residing in < County Name>: immunization data on patients associated with your organization and those residing within a given county. This option is only available for county organizations. (City organization functionality has been disabled in IRIS.)
- b. All Patients Associated with <Organization Name>: immunization data on all patients associated with your organization.

Benchmark Report

Select Patient Population

☐ Patients Associated with Selected Site ▼
☒ All Patients associated with IR Physicians

☒ Patients who did NOT meet the benchmark
☐ Patients who DID meet the benchmark
☐ All Patients, regardless of whether they met the benchmark or not

Select Age or Birth Date Range

☒ Less than or equal to 72 months old
☐ Birth date range Earliest Birth date: Latest Birth date:
☐ Age range Youngest Age: Days ▼ Oldest Age: Days ▼

Options for Benchmarking

☒ Standard Assessment
☐ Assess Patients with Sufficient Refusal History as Covered

Select Evaluation Date

Select Benchmark

Age Specific Immunization Benchmarks							
Age	DTaP	Hep B	Hib	MMR	Polio	Pneumo	Varicella
@ 3 months	1	1	1		1	1	
@ 5 months	2	2	2		2	2	
@ 7 months	3	2	2		2	2	
@ 9 months	3	2	2		2	2	
@ 12 months	3	2	2		2	2	
@ 16 months	4	3	3	1	3	3	1
@ 19 months	4	3	3	1	3	3	1
@ 21 months	4	3	3	1	3	3	1
@ 24 months	4	3	3	1	3	3	1
@ 72 months	5	3	4	2	4	4	1

Or select one of these aggregate outcomes:

@ 24 months		431	43133	431331	4313314	
@ 36 months		431	43133	431331	4313314	

Clear Selection

Generate
Cancel

3. Click one of the following to specify the patients to return on the report:
 - a. Patients who did NOT meet the benchmark: a list of patients who did not meet the benchmark(s) defined in the table.

IRIS Training Handout

- b. Patients who DID meet the benchmark: a list of patients who met the benchmark(s) defined in the table.
 - c. All patients, regardless of whether they met the benchmark or not: a list of all patients meeting the criteria defined in the table.
4. Select the age, birth date range, or age range of the patients by choosing one of the following. You may only enter up to age six years.
 - a. Less than or equal to 72 months old: all patients who are 72 months old or younger.
 - b. Birth date range: a range of birth dates. Enter the earliest birth date in the first field and the latest birth date in the second field that you wish included on the report or use the calendar icons beside each field to enter the dates.
 - c. Age range: an age range. In the Youngest Age field, use the drop down list next to it to choose days, months, or years. In the Oldest Age field, enter an age and use the drop down list to choose days, months, or years.
5. Select either the Standard Assessment or the Assess Patients with Sufficient Refusal History as Covered option for the report by choosing the appropriate radio button. Selecting the second option will return a benchmark report that counts patients with sufficient refusal comments as being up-to-date.



Note: Refusals of Vaccine

In order for patient refusals of vaccine to be calculated correctly on assessment and benchmark reports, an appropriate Start Date must be entered for refusal comments on the Patient Comments tab. Refer to the Managing Patients Chapter 10 of this manual for more information.



(view the screenshot on the next page)

6. Select the report evaluation date by entering the date in the field provided or by using the calendar icon to enter the date. No immunizations administered after the evaluation date will be included in the report.
7. Select the benchmark(s) to be used on the report:
8. To select one or more single vaccine benchmarks within a single row, click on the box where the vaccine and the number of months intersect. For example, clicking on the box with 4 in it where DTaP and @ 19 months intersect will result in a report with this benchmark included.
9. To select all benchmarks in a row, you may click on the first box in the row that indicates @ X months.
10. To select benchmarks in a predefined series, select one of the 431, 43133, or 431331, or 4313314 combinations at the bottom of the table.
11. Click the **Generate** button.
12. The Benchmark Report Status screen will display. Click on Refresh occasionally to check on the progress of the report. When the report is ready, click on the blue Benchmark hyperlink. Once this link is clicked, IRIS will display the Benchmark report at the bottom of the Benchmark Report Status screen. In addition, you may do one of the following:
13. Click the **Export as Text** link to display the report in text file format.
14. Click the **Export as a Spreadsheet** link to display the report in a spreadsheet format.
15. Click the **Display as a PDF** link to display the report in Adobe® Reader.



IRIS Training Handout

Benchmark Report

Select Patient Population

- ☐ Patients Associated with Selected Site
- ☒ All Patients associated with IR Physicians
-
- ☒ Patients who did NOT meet the benchmark
- ☐ Patients who DID meet the benchmark
- ☐ All Patients, regardless of whether they met the benchmark or not

Select Age or Birth Date Range

- ☒ Less than or equal to 72 months old
- ☐ Birth date range Earliest Birth date:  Latest Birth date: 
- ☐ Age range Youngest Age: Days ▼ Oldest Age: Days ▼

Options for Benchmarking

- ☒ Standard Assessment
- ☐ Assess Patients with Sufficient Refusal History as Covered

Select Evaluation Date



Select Benchmark

Age Specific Immunization Benchmarks							
Age	DTaP	Hep B	Hib	MMR	Polio	Pneumo	Varicella
@ 3 months	1	1	1		1	1	
@ 5 months	2	2	2		2	2	
@ 7 months	3	2	2		2	2	
@ 9 months	3	2	2		2	2	
@ 12 months	3	2	2		2	2	
@ 16 months	4	3	3	1	3	3	1
@ 19 months	4	3	3	1	3	3	1
@ 21 months	4	3	3	1	3	3	1
@ 24 months	4	3	3	1	3	3	1
@ 72 months	5	3	4	2	4	4	1
Or select one of these aggregate outcomes:							
@ 24 months			431	43133	431331	4313314	
@ 36 months			431	43133	431331	4313314	

Clear Selection

Generate

Cancel

IRIS Training Handout

Benchmark Report Results														
What would you like to do with this report?														
Export as Text				Export as a Spreadsheet				Display as a PDF						
Report 10228														
Iowa Immunization Registry Information System Report generated on 03/06/2012 Report generated by Heather Worachek IR Physicians - IRPH - Z90090														
Filter conditions used for this report:														
Patients Associated with Provider: IR Physicians														
Patients who did NOT meet the selected benchmark(s)														
Just consider immunizations as meeting the benchmark														
Age less than or equal to 72 months														
Evaluation date: 03/06/2012														
Benchmark age @ 19 months														
Selected benchmarks: 431331														
Total patients: 48; 0 patients (0%) met all benchmark criteria, 48 patients did not														
Report 10228; Results 1 - 48 of 48														
No	First Name	Last Name	Birth Date	Primary Phone Number	Street	City	State	Zipcode	DTaP (4)	Polio (3)	MMR (1)	Hib (3)	HepB (3)	Varicella (1)
1	MALE	AWESOME	10/29/2009				OR		N	N	N	N	N	N
2	PAULINE	BAUMM	04/21/2007	435	MILWAUKEE	IOWA CITY	IA	51565	N	N	N	N	N	N
3	BRITTANY	BAYER	01/30/2010	447	PICKNEY	ROCK RAPIDS	IA	50258	N	Y	Y	Y	Y	N
4	CLARICE	BERNWALL	09/20/2008	248	MILWAUKEE	HINTON	IA	50627	N	N	N	N	N	N
5	CLARICE	BERNWALL	09/20/2008	248	MILWAUKEE	HINTON	IA	50627	N	N	N	N	N	N
6	BILLY	BOB	10/18/2011				OR		N	N	N	N	N	Y
7	VIOLET	BRAUN	08/13/2010	88	PICKNEY	GRAND MOUND	IA	51022	N	N	N	N	N	N
8	ALEJANDRO	CHAVEZ	01/01/2010			EAGLE GROVE	IA	50533-3333	N	N	N	N	N	N
9	CRISTINA	CHAVEZ	01/01/2010			EAGLE GROVE	IA	50533	N	N	N	N	N	N
10	MONICA	CHAVEZ	02/02/2010				OR		N	N	N	N	N	N

The Benchmark Report shows a list of all patients who met the filter criteria specified when you set up the report. The report gives you a count and percent of how many patients met the specified criteria. It lists patients by first and last name, date of birth, phone number, and address. The Y or N in the columns after each patient's demographic information indicates whether the patient met the criteria for that vaccine and benchmark age.

Group Patients Report

The purpose of Group patients is to run either the Immunization History Report for a group of selected patients.

31 March 2012 Iowa Immunization Registry Information System IR Physicians Immunization History Report										
Patient ID: _____ Tracking Schedule: ACIP										
Patient Name: TESTCASE WELLS										
Birth Date: 08/02/2008 Gender: Unknown										
Age: 3 years, 7 months, 29 days										
Immun	Date Admin	Series	Vaccine [Trade Name]	Dose	Mfg Code	Lot #	Bod Rt.	Bod St.	Provider of Information	React

IRIS Training Handout

To run a group patient report, complete the following steps:

1. Click **Group Patients** under the Reports section of the menu panel.

Immunization History Report

☒ All patients within date of birth range

☐ All patients with immunization(s) administered by site **IR Physicians**

☐ All patients who received immunization(s) within dates

Specify how to sort data

Sort By: **Last Name, then by Age**

Generate **Reset**

2. To run a report for patients in a specific birth date range, click on the check box on the first line. Enter a from birth date and to birth date in MM/DD/YYYY format.
3. To run a report for patients who have immunizations administered by one of your sites, click on the check box on the second line. Choose a site from the drop down list. By selecting this option, you will limit this report to immunizations administered at your site.
4. To run a report for patients who have an immunization in a specific date range, click on the check box on the third line. Enter a from and to date in MM/DD/YYYY format.



Note: You may combine any of the criteria in the above steps. The system only selects patients who fulfill all the criteria you specify.



5. You may choose a sort order. Your two options are either by Last Name then Age or by Age, then Last Name.
6. If you wish to start over, click the **Reset** button. The system erases all the criteria you entered and starts with a fresh page. You may proceed to enter your criteria again.
7. When criteria are completed, click the **Generate** button. Click the **Refresh** button periodically (use same language used in assessment reports section) The system starts to generate the report and takes you to the Group Patient Reports Request Status screen.
8. After the report finishes generating, the top line on the Group Patient Reports Request Status screen becomes a hyperlink. Click the hyperlink.

Group Patient Reports Request Status					Refresh
Report Name	Started	Completed	Status	Patients	
Immunization History Report	2010-09-16 05:55:59.0	2010-09-16 05:55:59.0	100%	3	
Immunization History Report	2010-09-23 13:03:19.0	2010-09-23 13:03:24.0	100%	5	

9. The system displays the report output in PDF.

IRIS Training Handout

Assessment Reports



The Assessment Report feature in IRIS provides an analysis of an organization's immunization coverage rates. The following is a brief overview of the data that are returned on each table within the Assessment Report. Routinely reviewing patient records and assessing vaccination coverage rates are proven strategies to improve vaccination coverage in your organization.

IRIS Assessment Summary			
All Patients from: IR Physicians			
Evaluation Date: 04/15/2012		Date Report Was Run: 04/15/2012	
Age Group	Records Analyzed	Inactive	Records Meeting Criteria
36 - 72 Months of Age	49	2	47
24 - 35 Months of Age	41	0	41
12 - 23 Months of Age	25	1	24
< 12 Months of Age	8	1	7
Total	123	4	119


1. Click **Assessment Report** under the Reports section of the menu panel.

Assessment Report

Select Patient Population
☒ All Patients associated with IR Physicians

Select Age or Birth Date Range
☒ Less than or equal to 72 months old
☐ Birth date range Earliest Birth date:  Latest Birth date: 
☐ Age range Youngest Age: Days Oldest Age: Days

Options for Benchmarking
☒ Standard Assessment
☐ Assess Patients with Sufficient Refusal History as Covered

Select Evaluation Date
 



2. Select the patient population to be assessed by clicking one of the following:
3. All Patients Associated with <Organization Name>: Choose this option to view immunization data on all patients associated with your organization.
4. Select the age, birth date range, or age range of the patients by choosing one of the following:

IRIS Training Handout


- a. Less than 72 months old: Choose this option to return all patients who are 72 months or younger.
- b. Birth date range: Choose this option to enter a range of birth dates. Enter the earliest birth date in the first field and the latest birth date in the second field. Alternatively, use the calendar icons beside each field to enter the dates.
- c. Age range: Choose this option to enter an age range. Enter the youngest age range in the first field; use the drop down list next to it to choose days, months, or years. In the Oldest Age field, enter an age and use the drop down list to choose days, months, or years. You cannot search for patients older than 72 months.
- d. Select either the Standard Assessment or the Assess Patients with Sufficient Refusal history as Covered option for the report by choosing the appropriate radio button. Selecting the second option will return an assessment report that counts patients with sufficient refusal comments as being up-to-date.
- e. Select the assessment report evaluation date by entering the date in the field provided or by using the calendar icon to enter the date. No immunizations administered after the assessment criteria date will be included in the report.

Assessment Report

Select Patient Population
☐ Patients Associated with Selected Site
☒ All Patients associated with IR Physicians

Select Age or Birth Date Range
☐ Less than or equal to 72 months old
☐ Birth date range Earliest Birth date:  Latest Birth date: 
☒ Age range Youngest Age: Days Oldest Age: Years

Options for Benchmarking
☒ Standard Assessment
☐ Assess Patients with Sufficient Refusal History as Covered

Select Evaluation Date
 07/07/2011 

5. Click **Generate**.
6. The Assessment Report Status screen will display. Some reports will automatically generate and will appear in the Job Name – Evaluation Date and Age Range – Evaluation Date Sections. The number of reports that will automatically generate will vary based on the age range of patients assessed.

IRIS Training Handout

Assessment Report Status

Assessment of Patients With At Least One Missing Age Specific Benchmark

3 Months

Assessment Report Output Options

Job Name - Evaluation Date	Started	Status
(Assessment Report) IR Physicians - 07/07/2011	07/21/2011 10:41 AM	2 %
(Missed Opps Patients) IR Physicians - 07/07/2011	07/21/2011 10:41 AM	2 %

Records Meeting Criteria

Age Range - Evaluation Date	Number of Patients in Age Range	Started	Status
< 12 Months of Age - 07/07/2011	0	07/21/2011 10:41 AM	2 %
12 - 23 Months of Age - 07/07/2011	0	07/21/2011 10:41 AM	2 %
24 - 35 Months of Age - 07/07/2011	0	07/21/2011 10:41 AM	2 %
36 - 72 Months of Age - 07/07/2011	0	07/21/2011 10:41 AM	2 %
All Age Ranges - 07/07/2011	0	07/21/2011 10:41 AM	2 %

7. Click **Refresh** occasionally to check on the progress of the reports. When the reports are ready, the job name will appear underlined and in blue text and the status will display as Complete.
8. Once reports are complete, you may view the reports that automatically generated, or you may run additional reports. At this screen you may do the following:
9. Select an age from the drop down list provided and click on Generate (to the right of the age drop down list). Create an assessment report listing patients for an age-specific benchmark by selecting an age from the drop down list and clicking **Generate**. This report lists the patient's name, address, telephone number, and the vaccinations that they did or did not complete or refused by the benchmark age. A patient will show on the report if they missed at least one age-specific benchmark.
10. Click the underlined job name.
11. The report listing patients by benchmark age will have a job name of: (Benchmark Patient Listing) <Organization Name> - <Benchmark Age>.
12. The assessment report will be called: (Assessment Report)<Organization Name> - <Date>.
13. A report listing all patients who have missed a vaccination opportunity will have a job name of: (Missed Opps Patients)<Organization Name>-<Date>.
14. Click an underlined age range to view a listing of patients returned that fall within the specified range. This list will give the name, address, and telephone number for all patients meeting the record criteria. To view patients for all age ranges that meet the criteria, click the All Age Ranges link.
15. The report displays in Adobe Reader® if you clicked one of the report or age range links. To print one of the reports, click on the printer icon on the Adobe® toolbar.
16. Click **OK** in the Print Dialog box
17. To return to the Assessment Report Status screen, click the Back button in the browser.

IRIS Training Handout



Note: Patients with Refusals

If the option to Assess Patients with Sufficient Refusal History as Covered is selected when the assessment report is run, patients who fall short of needed, valid doses but have sufficient refusals to meet the benchmark are included within the count as if they received the needed doses.



Vaccine Eligibility

The Vaccines for Children (VFC) Report details the number of patients that were vaccinated by your organization for each Vaccine Eligibility type for a specified date range.

To generate a VFC Report:

1. Click **Vaccine Eligibility** under the Reports section of the menu panel.
2. Select the organization name from the drop-down list.

Vaccines for Children						
For Dates Between 03/01/2012 and 03/31/2012						
Report Run on:	04/15/2012					
Organization:	IR Physicians - Z90090					
Key: Vaccine Eligibility Code						
A - American India/Alaska Native				N - No Insurance		
M - Medicaid Enrolled				U - Underinsured		
Vaccine	M	N	A	U	Q	Total
DTP/aP-HepB-	2	2	0	0	0	4
Rotavirus	3	0	0	0	0	3

3. Enter a From date under the Report Date Range using the MM/DD/YYYY format.
4. Enter a To date under the Report Date Range using the MM/DD/YYYY format.
5. Choose a type of VFC Report to run. You have two choices:
 - a. The Age Group report displays a summary of patients by vaccine eligibility and four specific age ranges: < 1 year of age, 1-6 years of age, 7-18 years of age and 19 years and older.
 - b. The Vaccine Group report displays a summary of doses by vaccine eligibility and vaccine groups.
6. Click the **Generate Report** button.

IRIS Training Handout

Vaccine For Children Report Criteria

Organization(s): Generate Report

Organization Type:

Report Date Range:

From To

Report Type:

☒ Age Group

☐ Vaccine Group

Selecting the "All Org Summary" option will produce a summary report of all organizations.
The report types do not pertain to this option.

7. The form displays in Adobe® Reader. To print the report, click on the printer icon on the Adobe® toolbar.
8. Click the **OK** button in the Print dialog box. To return to the Vaccines for Children Report Criteria screen, click the Back button on your browser.

Ad Hoc Reports

The Ad Hoc reports function in IRIS allows the user to create one time use customized reports. Filters within the Ad Hoc reporting function help to narrow a search by date, vaccine group, active relationship to an organization, vaccine funding source, and other factors. The Ad Hoc reporting function produces two types of reports; one type produces lists with information about selected patients, the other type produces counts, either of patients or of immunizations. Both types of Ad Hoc reports have an Export button to allow the data to be exported to an Excel spreadsheet.

Iowa Immunization Registry Information System				
Report generated on 03/31/2012				
Report generated by Joseph Zehner				
IR Physicians - IRPH - Z90090				
Filter conditions used for this report:				
Patients associated with IR Physicians				
Vaccination date BETWEEN 01/01/2011 AND 12/31/2011				
Sort order: Last name ascending				
Number of rows in this report: 114				
No	Vaccine	Birth date	First name	Last name
1	Hib-OMP	01/30/2010	BRITTANY	BAYER
2	MMR	01/30/2010	BRITTANY	BAYER

Notes: Patients whose information is added or changed on the day the report is run will not appear in the results until the following day. Ad Hoc reports run against all patients associated with your organization. To disassociate a patient from your organization you must change their status in the organization information section of the patient's record.

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Ad Hoc List Reports

To produce a list of information about selected patients:

1. Click **Ad Hoc List Report** under the Reports section of the menu panel.
2. Select the items that you would like to display on the report by double-clicking the desired items from the left column (for example, Patient Last Name) or by highlighting the item and clicking **Add**. This will copy the item to the right column and add it to your report.
3. Select the single item by which you would like to have the report sorted and click the sort order (first-to-last or last-to-first). *Note:* Sorting the report will increase the time it takes to process it.

The screenshot shows a web-based interface for creating a customized list report. The title bar reads "Create a Customized List Report".

What items would you like to display on the report?

On the left, under the heading "Patient", is a list of items: American Indian or Alaska Native, Asian, Birth County, Birth date, Black or African-American, Consent Indicator, County of Residence, and First name. To the right of this list are three buttons: "Add >", "< Remove", and "< Remove All". To the right of these buttons is a large empty rectangular box for the selected items.

How would you like the report to be sorted?

Item to sort on: (not sorted) [dropdown arrow]. Order: ☐ First-to-Last ☐ Last-to-First. Below this is a note: "A report takes longer to run if you want it to be sorted."

How would you like to filter the data?

Item to filter on: (no filters) [dropdown arrow]. Comparison: [dropdown arrow]. Value to compare to: [dropdown arrow] [calendar icon]. and [dropdown arrow] [calendar icon]. To the right of these fields is a button labeled "Add/Save Edit".

Selected Filters

Below this heading is a large empty rectangular box. To the right of this box are five buttons: "Edit", "Remove", "And/Or", "Group", and "UnGroup".

At the bottom of the dialog are two buttons: "Generate" and "Cancel".

4. Under Item to filter on, select an item that you would like to add as a filter using the drop down list. For example, Birth Date Range could be an item used as a filter.

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5. Filters in IRIS are used to narrow information down so that it answers a user's query. Under Comparison, select a word from the drop down list that best describes the type of comparison you wish to make; for example, Between. =
6. Under Value to compare to, either choose a value from the drop down list in the left field and/or enter a date in the right field.
7. Under And, select another value from the drop down list in the left field or enter the ending date in the right field, if applicable.
8. Click the **Add/Save Edit** button. Repeat steps 4-8 for each item you wish to filter.

The screenshot shows a web-based filtering interface. At the top, a title bar reads "How would you like to filter the data?". Below this, there are several input fields: "Item to filter on" with a dropdown menu showing "Birth date", "Comparison" with a dropdown menu showing "BETWEEN", and "Value to compare to" with two input fields. The first input field contains "07/21/2006" and the second contains "07/21/2011". There are small calendar icons next to these date fields. Below the input fields, there is a button labeled "Add/Save Edit". Underneath the input fields, there is a section titled "Selected Filters" which contains a text box displaying the filter criteria: "Birth date BETWEEN 07/21/2006 AND 07/21/2011". To the right of this text box, there are five buttons: "Edit", "Remove", "And/Or", "Group", and "UnGroup". At the bottom of the interface, there are two buttons: "Generate" and "Cancel".

9. When finished adding filter items:
 - a. Within the Selected Filters section, to change AND to OR, highlight 'AND' and click the **'And/Or'** button. Alternatively, can also be switched to AND by following the same process.
 - b. Group them together by highlighting two filter statements and clicking the **Group** button. This groups the filters together in the report.
 - c. Highlight a grouped statement and click the **Ungroup** button to ungroup it. This removes the filters from being grouped together in the report.
 - d. Highlight a statement and click the **Remove** button to remove it from the selected filters.
 - e. Highlight a statement and click the **Edit** button to make changes to a statement. Make the necessary changes to the statement in the filtering section of the screen and click the **Add/Save Edit** button.
10. Click the **Generate** button. The Ad Hoc Report Status page will display; see the Ad Hoc Report Status section of this chapter for more information.
11. To print the report, click the printer icon on the Adobe® toolbar. Click the **OK** button in the Print dialog box.
12. To return to the Patient Reports screen, you may close the Acrobat Reader® by clicking the X button in the upper right corner of the report window.

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Ad Hoc Count Report

To produce a count of selected patients or immunizations:

1. Click **Ad Hoc Count Report** under the Reports section of the menu panel.
2. Select whether Patients or Immunizations will be counted by clicking the appropriate radio button at the top of the screen.

3. Select the factors you would like to use to group the counts on the report by double-clicking on the desired item from the left column (for example, Vaccine Group) or by highlighting the item and clicking the **Add** button. This will copy the item to the right column so that it can be used in your report. You can choose a maximum of three factors.
4. Under Item to filter on select an item that you would like to add as a filter using the drop down list. For example, Birth Date Range could be an item used as a filter.
5. Under Comparison, select a word from the drop down list that best describes the type of comparison you wish to make. For example, between is one comparison operator.
6. Under Value to compare to, either choose a value from the drop down list in the left field or enter a beginning date in the right field.

7. Under and, select another value from the drop down list in the left field or enter the ending date in the right field, if applicable.
8. Click on **Add/Save**. Repeat Steps 4-8 for each item you wish to filter.
9. When finished adding filter items, you may do the following:
 - a. Group them together by highlighting two filter statements and click Group.
 - b. Change AND to OR by highlighting 'AND' and clicking the **And/Or** button. OR can also be switched to AND by following the same process.
 - c. Highlight a grouped statement and click on **Ungroup** to ungroup it.
 - d. Highlight a statement and click on **Remove** to remove it from the selected filters.

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- e. Highlight a statement and click on **Edit** to make changes to a statement. Make the necessary changes to the statement in the filtering section of the screen and click on **Add/Save**
10. Click **Generate**. The Ad Hoc Report Status page will display; see the Ad Hoc Report Status section of this chapter for more information.

Ad Hoc Report Status

1. The Ad Hoc Report Status screen will display after you click **Generate** on the Ad Hoc Count or Ad Hoc List Report screens. You may also access the status screen by clicking on Ad Hoc Report Status under the Reports section of the menu panel.

Ad Hoc Report Status					Refresh	Cancel
Report Type	Started	Completed	Status	Row Count		
COUNT	01/11/2012 07:33 AM		PROCESSING	0		
LIST	01/11/2012 07:31 AM	01/11/2012 07:31 AM	DONE	86		

2. Click **Refresh** occasionally to check the status of the report. Once the underlined report type appears in blue, click it. The report will display directly on the screen.
3. At the top of the report there are 3 links for selecting how the data is to be handled:
 - Export as Text
 - Export as spreadsheet
 - Display as PDF
4. If you wish to print the report, click **Print** under the **File** menu within the application (text file, spreadsheet, or Adobe® Reader). In the print dialog box, adjust the print options as necessary, and then click either **Print** or **OK**, depending on the application.



Note: Ad hoc reports are retained for 72 hours per organization. IRIS will retain one count report and one list report for that period. If a new report of the same type is generated, the new report will replace the existing report.

